STATE OF WASHINGTON
Higher Education Coordinating Board

REQUEST FOR PROPOSALS (RFP)

RFP NO. 13-RFP122

NOTE: If you download this RFP from an agency website (http://www.hecb.wa.gov/ or
http://www.gearup.wa.gov) you are responsible for sending your name, address, e-mail
address, and telephone number to the RFP Coordinator in order for your organization to receive
any RFP amendments or bidder questions/agency answers.

    PROJECT TITLE: Washington College and Career Ready Website

    PROPOSAL DUE DATE: April 16, 2012 – 5 PM, *Pacific Daylight Time* Olympia,
Washington, USA.

    E-mailed bids will be accepted. Faxed bids will not.

    ESTIMATED TIME PERIOD FOR CONTRACT: 5/22/2012– 12/31/2012. The Agency
reserves the right to extend the contract for up to two additional one-year periods at the
sole discretion of the Agency.   The contract is contigent upon continued federal funding
for future years.

    CONSULTANT ELIGIBILITY: This procurement is open to those consultants that
satisfy the minimum qualifications stated herein and that are available for work in
Washington State.

    CONTENTS OF THE REQUEST FOR PROPOSALS:

1. Introduction
2. General Information for Consultants
3. Proposal Contents
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1. INTRODUCTION

1.1. PURPOSE AND BACKGROUND

The Washington State Higher Education Coordinating Board, hereafter called "AGENCY," is initiating this Request for Proposals (RFP) to solicit proposals from firms interested in developing a College & Career Ready website for Washingtonians. The project will be managed by the Washington State GEAR UP and Washington College Access Challenge Grant programs[1].

Washington State lacks an online destination where students, families, and teachers can browse comprehensive college planning, application, and financial aid information. The new College & Career Ready Website will be a clearinghouse for useful, vetted online resources made accessible through a portal-like interface. Additionally, the website should include features and functionality to promote user engagement and interaction.

Educators, families, and students will use the website as a resource to support the following broadly defined college planning and preparation activities:

- Taking the courses in middle and high school that are rigorous, sequentially progressive, and aligned with college readiness benchmarks and the Common Core State Standards.

- Exploring career opportunities and the multiple options to realize such opportunities.

- Signing up for and taking the right tests including the EXPLORE, PLAN, and ACT.

- Applying to post secondary institutions and programs.

- Applying for financial aid and finding scholarships.

- Meeting all the deadlines in the college application process.

During the spring of 2011, Washington State GEAR UP contracted with two strategic communications firms to conduct research and evaluate current outreach materials, the gearup.wa.gov website, and other program activities. The results of that process will inform the development of the College & Career Ready Website. The reports detailing the project are attached here for reference as Exhibits C and D.

The overarching goals of this project are to conceive an identity and develop a new online destination that includes information and applicable tools for college planning and preparation that address academic preparation, social connection and support, and financial aid. This new website will replace the current GEAR UP site (www.gearup.wa.gov).

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[1] Washington State GEAR UP (Gaining Early Awareness and Readiness for Undergraduate Programs) is a college access program administered by the AGENCY. Washington was awarded its third consecutive state GEAR UP grant by the US Department of Education in 2011. The six-year award will be used to provide direct services to 6,000 students in 28 high-poverty school districts statewide. In addition to the state GEAR UP program, Washington is home to ten GEAR UP partnership programs that serve a combined 26,000 additional students.

The purpose of the federally funded College Access Challenge Grant (CACG) program is to provide services and support to low-income, first-generation college students and their families to help them prepare for college and careers. The AGENCY has administered the CACG since 2008.

The AGENCY may award one or more contract(s) to provide the services described in this RFP.

1.2. OBJECTIVES AND SCOPE OF WORK

GEAR UP is seeking a qualified firm to provide website development and design to expand and enhance the resources that Washington State provides to students, families, and educators to support college and career readiness. This new website will build on the existing work of Washington State GEAR UP, but will target a broader audience to ensure that accurate, relevant, and timely information is available to assist them in planning for and succeeding in postsecondary education and beyond.

The website must be built in Drupal and provide rich and engaging user experiences within this CMS framework. The website will provide a vibrant and authentic user experience and provide clear, compelling pathways for audiences to access information.

This new online entity will offer the best of what GEAR UP provides on the ground (support, inspiration, information, and guidance), plus new features that address identified needs from key audiences: educators, students, and families collected in a needs assessment conducted in Spring 2011.

Specifically, the following objectives must be addressed:

- Create new brand (logo, styles, identity) for statewide college and career information website.

- Develop an interactive website that serves the needs of the target audiences: students/families/teachers in Washington State, including those who may not have access to the GEAR UP program, but may be part of other college access and success programs such as the Washington College Bound Scholarship, Talent Search and Upward Bound.

- Provide user friendly access (for example, increasing browsing interactivity) to existing and new resources

- Create a timeline management tool for students and parents.

- Create a forum of "real" stories and advice from GEAR UP alumni.

- Develop a social networking space to enable participation and social validation through sharing and peer-to-peer interactions.

- Develop content delivery through multi-touch points.

- Provide user training to AGENCY staff upon delivery.

Scope of Work:

Activity	Deliverable
Phase I – Research and Discovery May – June, 2012	

Initial meeting between AGENCY and consultant.	Summary of Meeting notes.
Research and review current website, collaterals and other communications materials; Research audience demographics.	Recommendations report.
Conduct focus groups to assess ease of use of content and features	Findings report.
Define application features and functionality.	Technical specifications.
Phase II Identity and Design Development May – June, 2012	
Create attitude boards for new identity.	At least 4 options for identity logo/styles.
Develop creative brief for new brand.	Creative brief.
Develop initial website design concepts.	3 brief concepts.
Develop high-level information architecture & detailed content outline.	Content map.
Assess usability.	Findings report.
Draft high-level narrative content.	Subject area content.
Develop content and social media strategy.	Communications plan.
Phase III – Technical Development July – September 2012	
Refine chosen website design concept.	Website shell pages.
Implement core functionality of the website.	Functional pre-production site.
Integration of content into application framework.	Functional pre-production site.
Assess Usability	Findings Report
Phase IV – User Testing & Website Launch October – December 2012	
Refine key messages, narrative content, & functionality.	Refined website.
Provide site management training to HECB staff.	Training documentation.
Launch website.	Project completion.

1.3   MINIMUM QUALIFICATIONS

Minimum qualifications include:
- Licensed to do business in the State of Washington or provide a commitment that it will become licensed in Washington within thirty (30) calendar days of being selected as the Apparently Successful Contractor.
- 2 years experience creating identities and branding strategies for the public sector.
- 2 years experience delivering complex, content-heavy Drupal websites for multiple audiences.
- 2 years experience creating successful social media strategies in the education sector.
- 2 years experience integrating third party services and technologies with Drupal.

Bidders who do not meet these minimum qualifications will be rejected as non-responsive and will not receive further consideration. Any proposal that is rejected as non-responsive will not be evaluated or scored.

1.4   FUNDING

The AGENCY has budgeted an amount not to exceed **two hundred thousand** dollars ($**200,000**) for this project. Proposals in excess of $**200,000** will be considered non-responsive and will not be evaluated. In the event additional funding becomes available, any contract awarded may be renegotiated to provide for additional related services.

Any contract awarded as a result of this procurement is contingent upon the availability of funding. **This project will be entirely funded with federal funding from the GEAR UP (CFDA #84.334) and College Access Challenge Grant (CFDA #84.378) programs.**

Any contract awarded as a result of this procurement is contingent upon the availability of funding.

1.5   PERIOD OF PERFORMANCE

The period of performance of any contract resulting from this RFP is tentatively scheduled to begin on or about May 22, 2012 and to end on December 31, 2012. The AGENCY reserves the right to extend the contract for up to two one-year periods Amendments extending the period of performance, if any, shall be at the sole discretion of the AGENCY.

1.6   CONTRACTING WITH CURRENT OR FORMER STATE EMPLOYEES

Specific restrictions apply to contracting with current or former state employees pursuant to chapter 42.52 of the Revised Code of Washington. Proposers should familiarize themselves with the requirements prior to submitting a proposal that includes current or former state employees.

1.7   DEFINITIONS

Definitions for the purposes of this RFP include:

Agency – The Higher Education Coordinating Board is the agency of the state of Washington that is issuing this RFP.

Apparent Successful Contractor – The consultant selected as the entity to perform the anticipated services, subject to completion of contract negotiations and execution of a written contract.

Consultant – Individual or company interested in the RFP and that may or does submit a proposal in order to attain a contract with the AGENCY.

Contractor – Individual or company whose proposal has been accepted by the AGENCY and is awarded a fully executed, written contract.

Proposal – A formal offer submitted in response to this solicitation.

Proposer - Individual or company that submits a proposal in order to attain a contract with the AGENCY.

Request for Proposals (RFP) – Formal procurement document in which a service or need is identified but no specific method to achieve it has been chosen. The purpose of an RFP is to permit the consultant community to suggest various approaches to meet the need at a given price.

1.8   Americans with Disabilities Act (ADA)

The AGENCY complies with the Americans with Disabilities Act (ADA). Consultants may contact the RFP Coordinator to receive this Request for Proposals in Braille or on audio tape.

2.   GENERAL INFORMATION FOR CONSULTANTS

2.1.   RFP COORDINATOR

The RFP Coordinator is the sole point of contact in the AGENCY for this procurement. All communication between the Consultant and the AGENCY upon release of this RFP shall be with the RFP Coordinator, as follows:

Name	Alison Eldridge
E-Mail Address	Alisone@hecb.wa.gov
Mailing Address	Higher Education Coordinating Board
	917 Lakeridge Way SW
	P.O. Box 43430
	Olympia, WA 98504-3430
Physical Address for Delivery	917 Lakeridge Way SW
	Olympia, WA 98504-3430
Phone Number	(360) 753-7835

Any other communication will be considered unofficial and non-binding on the AGENCY. Consultants are to rely on written statements issued by the RFP Coordinator. Communication directed to parties other than the RFP Coordinator may result in disqualification of the Consultant.

2.2. ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES

Issue RFP	3/12/2012
Question & answer period	3/13 – 3/30/2012
Issue last addendum to RFP	4/2/2012
Proposals due	4/16/2012
Evaluate proposals	4/16 – 4/27/2012
Conduct oral interviews with finalists, if required	5/1/2012
Announce "Apparent Successful Contractor" and send notification via fax or e-mail to unsuccessful proposers	5/1/2012
Hold debriefing conferences (if requested)	5/3 – 5/4/2012
Negotiate contract	5/1 – 5/9/2012
File contract with OFM (if required)	5/9/2012
Begin contract work	5/22/2012

The AGENCY reserves the right to revise the above schedule.

2.3 SUBMISSION OF PROPOSALS

Proposals may not be transmitted using facsimile transmission.

PROPOSALS:
Consultants are required to submit one (1) hard copy and one electronic copy of their proposal. The hard copy proposal must have original signatures. The hard copy proposal, whether mailed or hand delivered, must arrive at the AGENCY no later than 5 PM, Pacific Pacific Daylight Time on Monday, April 16, 2012

The proposal is to be sent to the RFP Coordinator at the address noted in Section 2.1. The envelope should be clearly marked to the attention of the RFP Coordinator.

Consultants mailing proposals should allow normal mail delivery time to ensure timely receipt of their proposals by the RFP Coordinator. Consultants assume the risk for the method of delivery chosen. The AGENCY assumes no responsibility for delays caused by any delivery service. Proposals may not be transmitted using facsimile transmission.

Late proposals will not be accepted and will be automatically disqualified from further consideration. All proposals and any accompanying documentation become the property of the AGENCY and will not be returned.

The electronic proposal must be submitted in one PDF document as an attachment to an e-mail to Alison Eldridge, the RFP Coordinator, at the e-mail address listed in Section 2.1. Zipped files cannot be received by the AGENCY and cannot be used for submission of

proposals. The AGENCY does not assume responsibility for problems with Consultant's e-mail. If the AGENCY'S email is not working, appropriate allowances will be made.

Consultants should allow sufficient time to ensure timely receipt of the proposal by the RFP Coordinator. Late proposals will not be accepted and will be automatically disqualified from further consideration, unless the AGENCY'S e-mail is found to be at fault. All proposals and any accompanying documentation become the property of the AGENCY and will not be returned.

2.4 PROPRIETARY INFORMATION/PUBLIC DISCLOSURE

Proposals submitted in response to this competitive procurement shall become the property of the AGENCY.

All proposals received shall remain confidential until the contract, if any, resulting from this RFP is signed by the Director of the AGENCY and the apparent successful Contractor; thereafter, the proposals shall be deemed public records as defined in RCW 42.56.

Any information in the proposal that the Consultant desires to claim as proprietary and exempt from disclosure under the provisions of RCW 42.56 must be clearly designated. The page must be identified, as well as the particular exception from disclosure upon which the Consultant is making the claim. Each page claimed to be exempt from disclosure must be clearly identified by the word "Confidential" printed on the lower right hand corner of the page.

The AGENCY will consider a Consultant's request for exemption from disclosure; however, the AGENCY will make a decision predicated upon RCW 42.56. Designating the entire proposal exempt from disclosure will not be honored. The Consultant must be reasonable in designating information as confidential. If any information is designated as proprietary in the proposal, such information will not be made available until the affected proposer has been given an opportunity to seek a court injunction against the requested disclosure.

A charge will be made for copying and shipping, as outlined in RCW 42.56. No fee shall be charged for inspection of contract files, but twenty-four (24) hours' notice to the RFP Coordinator is required. All requests for information should be directed to the RFP Coordinator.

2.5 REVISIONS TO THE RFP

In the event it becomes necessary to revise any part of this RFP, addenda will be provided via e-mail to all individuals who have made the RFP Coordinator aware of their interest. Addenda will also be published on http://www.hecb.wa.gov/ and http://www.gearup.wa.gov. For this purpose, the published questions and answers and any other pertinent information shall be provided as an addendum to the RFP and will be placed on the website.

If you downloaded this RFP from the Agency websites located at: http://www.hecb.wa.gov/ or http://www.gearup.wa.gov, you are responsible for sending your name, e-mail address, and telephone number to the RFP Coordinator in order for your organization to receive any RFP addenda.

The AGENCY also reserves the right to cancel or to reissue the RFP, in whole or in part, prior to execution of a contract.

2.6 MINORITY & WOMEN-OWNED BUSINESS PARTICIPATION

In accordance with chapter 39.19 RCW, the state of Washington encourages participation in all of its contracts by firms certified by the Office of Minority and Women's Business Enterprises (OMWBE). Participation may be either on a direct basis in response to this solicitation or on a subcontractor basis. However, no preference will be included in the evaluation of proposals, no minimum level of MWBE participation shall be required as a condition for receiving an award, and proposals will not be rejected or considered non-responsive on that basis.

The established annual procurement participation goals for MBE is 10% and for WBE, 4%, for this type of project. These goals are voluntary. For information on certified firms, consultants may contact OMWBE at 360-753-9693 or http://www.omwbe.wa.gov.

2.7 ACCEPTANCE PERIOD

Proposals must provide sixty (60) days for acceptance by AGENCY from the due date for receipt of proposals.

2.8 RESPONSIVENESS

All proposals will be reviewed by the RFP Coordinator to determine compliance with administrative requirements and instructions specified in this RFP. The Consultant is specifically notified that failure to comply with any part of the RFP may result in rejection of the proposal as non-responsive.

The AGENCY also reserves the right at its sole discretion to waive minor administrative irregularities.

2.9 MOST FAVORABLE TERMS

The AGENCY reserves the right to make an award without further discussion of the proposal submitted. Therefore, the proposal should be submitted initially on the most favorable terms which the Consultant can propose. There will be no best and final offer procedure. The AGENCY does reserve the right to contact a Consultant for clarification of its proposal.

The Apparent Successful Contractor should be prepared to accept this RFP for incorporation into a contract resulting from this RFP. Contract negotiations may incorporate some or all of the Consultant's proposal. It is understood that the proposal will become a part of the official procurement file on this matter without obligation to the AGENCY.

2.10 CONTRACT AND GENERAL TERMS & CONDITIONS

The Apparent Successful Contractor will be expected to enter into a contract that is substantially the same as the sample contract and its general terms and conditions attached as Exhibit B. In no event is a Consultant to submit its own standard contract terms and

conditions in response to this solicitation. The Consultant may submit exceptions as allowed in the Certifications and Assurances form, Exhibit A to this solicitation. All exceptions to the contract terms and conditions must be submitted as an attachment to Exhibit A, Certifications and Assurances form. The AGENCY will review requested exceptions and accept or reject the same at its sole discretion.

2.11   COSTS TO PROPOSE

The AGENCY will not be liable for any costs incurred by the Consultant in preparation of a proposal submitted in response to this RFP, in conduct of a presentation, or any other activities related to responding to this RFP.

2.12   NO OBLIGATION TO CONTRACT

This RFP does not obligate the state of Washington or the AGENCY to contract for services specified herein.

2.13   REJECTION OF PROPOSALS

The AGENCY reserves the right at its sole discretion to reject any and all proposals received without penalty and not to issue a contract as a result of this RFP.

2.14   COMMITMENT OF FUNDS

The Director of the AGENCY or the Director's delegate is the only individual who may legally commit the AGENCY to the expenditures of funds for a contract resulting from this RFP. No cost chargeable to the proposed contract may be incurred before receipt of a fully executed contract.

2.15   ELECTRONIC PAYMENT

The state of Washington prefers to utilize electronic payment in its transactions. The successful contractor will be provided a form to complete with the contract to authorize such payment method.

2.16   INSURANCE COVERAGE

The Contractor is to furnish the Agency with a certificate(s) of insurance executed by a duly authorized representative of each insurer, showing compliance with the insurance requirements set forth below.

The Contractor shall, at its own expense, obtain and keep in force insurance coverage which shall be maintained in full force and effect during the term of the contract. The Contractor shall furnish evidence in the form of a Certificate of Insurance that insurance shall be provided, and a copy shall be forwarded to the AGENCY within fifteen (15) days of the contract effective date.

Liability Insurance

1) Commercial General Liability Insurance: Contractor shall maintain commercial general liability (CGL) insurance and, if necessary, commercial umbrella insurance, with a limit of not less than $1,000,000 per each occurrence. If CGL insurance contains aggregate limits, the General Aggregate limit shall be at least twice the "each occurrence" limit. CGL insurance shall have products-completed operations aggregate limit of at least two times the "each occurrence" limit. CGL insurance shall be written on ISO occurrence from CG 00 01 (or a substitute form providing equivalent coverage). All insurance shall cover liability assumed under an insured contract (including the tort liability of another assumed in a business contract), and contain separation of insureds (cross liability) condition.

   Additionally, the Contractor is responsible for ensuring that any subcontractors provide adequate insurance coverage for the activities arising out of subcontracts.

2) Business Auto Policy: As applicable, the Contractor shall maintain business auto liability and, if necessary, commercial umbrella liability insurance with a limit not less than $1,000,000 per accident. Such insurance shall cover liability arising out of "Any Auto." Business auto coverage shall be written on ISO form CA 00 01, 1990 or later edition, or substitute liability form providing equivalent coverage.

Employers Liability ("Stop Gap") Insurance: In addition, the Contractor shall buy employers liability insurance and, if necessary, commercial umbrella liability insurance with limits not less than $1,000,000 each accident for bodily injury by accident or $1,000,000 each employee for bodily injury by disease.

Additional Provisions

Above insurance policy shall include the following provisions:

1. **Additional Insured.** The state of Washington, the AGENCY, its elected and appointed officials, agents, and employees shall be named as an additional insured on all general liability, excess, umbrella, and property insurance policies. All insurance provided in compliance with this contract shall be primary as to any other insurance or self-insurance programs afforded to or maintained by the state.

2. **Cancellation.** The AGENCY shall be provided written notice before cancellation or non-renewal of any insurance referred to therein, in accord with the following specifications. Insurers subject to 48.18 RCW (Admitted and Regulation by the Insurance Commissioner): The insurer shall give the state 45 days advance notice of cancellation or non-renewal. If cancellation is due to non-payment of premium, the state shall be given ten (10) days advance notice of cancellation. Insurers subject to 48.15 RCW: The state shall be given twenty (20) days advance notice of cancellation. If cancellation is due to non-payment of premium, the state shall be given ten (10) days advance notice of cancellation.

3. **Identification.** Policy must reference the state's contract number and the agency name.

4. **Insurance Carrier Rating.** All insurance and bonds should be issued by companies admitted to do business within the state of Washington and have a rating of A-, Class VII or better in the most recently published edition of Best's Reports. Any exception shall be reviewed and approved by the AGENCY's Risk Manager, or the Risk Manager for the state of Washington, before the contract is accepted or work may begin. If an insurer is not admitted, all insurance policies and procedures for issuing the insurance policies must comply with Chapter 48.15 RCW and 284-15 WAC.

5. **Excess Coverage.** By requiring insurance herein, the state does not represent that coverage and limits will be adequate to protect Contractor, and such coverage and limits shall not limit Contractor's liability under the indemnities and reimbursements granted to the state in this contract.

Workers' Compensation Coverage

The Contractor will at all times comply with all applicable workers' compensation, occupational disease, and occupational health and safety laws, statutes, and regulations to the full extent applicable. The state will not be held responsible in any way for claims filed by the Contractor or their employees for services performed under the terms of this contract.

3. PROPOSAL CONTENTS

HARD COPY:
Proposals must be written in English and submitted on eight and one-half by eleven inch (8 ½" x 11") paper with tabs separating the major sections of the proposal. The four major sections of the proposal are to be submitted in the order noted below:

1. Letter of Submittal, including signed Certifications and Assurances (Exhibit A to this RFP);
2. Technical Proposal;
3. Management Proposal; and,
4. Cost Proposal.

AND

ELECTRONIC PROPOSALS:
Proposals must be written in English and submitted electronically in one PDF document to the RFP Coordinator in the order noted below:

1. Letter of Submittal, including signed Certifications and Assurances (Exhibit A to this RFP);
2. Technical Proposal;
3. Management Proposal; and,
4. Cost Proposal.

Proposals must provide information in the same order as presented in this document with the same headings. This will not only be helpful to the evaluators of the proposal, but should assist the Consultant in preparing a thorough response.

Items marked "mandatory" must be included as part of the proposal for the proposal to be considered responsive; however, these items are not scored. Items marked "scored" are those that are awarded points as part of the evaluation conducted by the evaluation team.

3.1. LETTER OF SUBMITTAL (MANDATORY)

The Letter of Submittal and the attached Certifications and Assurances form (Exhibit A to this RFP) must be signed and dated by a person authorized to legally bind the Consultant to a contractual relationship, e.g. the President or Executive Director if a corporation, the managing partner if a partnership, or the proprietor if a sole proprietorship. Along with introductory remarks, the Letter of Submittal is to include by attachment the following information about the Consultant and any proposed subcontractors:

1. Name, address, principal place of business, telephone number, and fax number/ e-mail address of legal entity or individual with whom contract would be written.

2. Name, address, and telephone number of each principal officer (President, Vice President, Treasurer, Chairperson of the Board of Directors, etc.)

3. Legal status of the Consultant (sole proprietorship, partnership, corporation, etc.) and the year the entity was organized to do business as the entity now substantially exists.

4. Federal Employer Tax Identification number or Social Security number and the Washington Uniform Business Identification (UBI) number issued by the state of Washington Department of Revenue. If the Consultant does not have a UBI number, the Consultant must state that it will become licensed in Washington within thirty (30) calendar days of being selected as the Apparent Successful Contractor.

5. Location of the facility from which the Consultant would operate.

6. Identification of any state employees or former state employees employed or on the firm's governing board as of the date of the proposal. Include their position and responsibilities within the Consultant's organization. If following a review of this information, it is determined by the AGENCY that a conflict of interest exists, the Consultant may be disqualified from further consideration for the award of a contract.

3.2. TECHNICAL PROPOSAL (SCORED)

The Technical Proposal must contain a comprehensive description of services including the following elements:

A. **Project Approach/Methodology** – Include a complete description of the Consultant's proposed approach and methodology for the project. This section should convey Consultant's understanding of the proposed project.

B. **Work Plan -** Include all project requirements and the proposed tasks, services, activities, etc., necessary to accomplish the scope of the project defined in this RFP. This section of the technical proposal must contain sufficient detail to convey to members of the evaluation team the Consultant's knowledge of the subjects and skills necessary to successfully complete the project. Include any required involvement of AGENCY staff. The Consultant may also present any creative approaches that might be appropriate and may provide any pertinent supporting documentation.

C. **Project Schedule** - Include a project schedule indicating when the elements of the work will be completed. Project schedule must ensure that any deliverables requested are met.

D. **Outcomes and Performance Measurement** – Describe the impacts/outcomes the Consultants propose to achieve as a result of the delivery of these services, including how these outcomes would be monitored, measured, and reported to the AGENCY.

E. **Risks** – The Consultant must identify potential risks that are considered significant to the success of the project. Include how the Consultant would propose to effectively monitor and manage these risks, including reporting of risks to the AGENCY'S contract manager.

F. **Deliverables** – Fully describe deliverables to be submitted under the proposed contract. Deliverables must support the requirements set forth in Section 1.2, Objectives and Scope of Work.

3.3. MANAGEMENT PROPOSAL

A. **Project Management (SCORED)**

1. **Project Team Structure/Internal Controls** - Provide a description of the proposed project team structure and internal controls to be used during the course of the project, including any subcontractors. Provide an organizational chart of your firm indicating lines of authority for personnel involved in performance of this potential contract and relationships of this staff to other programs or functions of the firm. This chart must also show lines of authority to the next senior level of management. Include who within the firm will have prime responsibility and final authority for the work.

2. **Staff Qualifications/Experience** - Identify staff, including subcontractors, who will be assigned to the potential contract, indicating the responsibilities and qualifications of such personnel, and include the amount of time each will be assigned to the project. Provide resumes' for the named staff, which include information on the individual's particular skills related to this project, education, experience, significant accomplishments and any other pertinent information. The Consultant must commit that staff identified in its proposal will actually perform the assigned work. Any staff substitution must have the prior approval of the AGENCY.

B. **Experience of the Consultant (SCORED)**

1. Indicate the experience the Consultant and any subcontractors have in the following areas associated with

   - 2 years experience creating identities and branding strategies for the public sector.
   - 2 years experience delivering complex, content-heavy Drupal websites for multiple audiences.
   - 2 years experience creating successful social media strategies in the education sector.
   - 2 years experience integrating third party services and technologies with Drupal.

2. Include links to projects developed for similar audiences, agencies/organizations, or other projects you believe document your experience in developing websites and digital tools and resources for students, families, and educators.

3. Indicate other relevant experience that indicates the qualifications of the Consultant, and any subcontractors, for the performance of the potential contract.

4. Include a list of contracts the Consultant has had during the last five years that relate to the Consultant's ability to perform the services needed under this RFP. List contract reference numbers, contract period of performance, contact persons, telephone numbers, and fax numbers/e-mail addresses.

C. Related Information (MANDATORY)

1. If the Consultant or any subcontractor contracted with the state of Washington during the past 24 months, indicate the name of the agency, the contract number(s) and project description, and/or other information available to identify the contract(s).

2. If the Consultant's staff or subcontractor's staff was an employee of the state of Washington during the past 24 months, or is currently a Washington State employee, identify the individual(s) by name, the agency previously or currently employed by, job title or position held, and separation date.

3. If the Consultant has had a contract terminated for default in the last five years, describe such incident. Termination for default is defined as notice to stop performance due to the Consultant's non-performance or poor performance and the issue of performance was either (a) not litigated due to inaction on the part of the Proposer, or (b) litigated, and such litigation determined that the Proposer was in default. Submit full details of the terms for default including the other party's name, address, and phone number. Present the Consultant's position on the matter. The AGENCY will evaluate the facts and may, at its sole discretion, reject the proposal on the grounds of the past experience. If no such termination for default has been experienced by the Consultant in the past five years, so indicate.

D. References (MANDATORY)

List names, addresses, telephone numbers, and e-mail addresses of three (3) business references for the Consultant and three (3) business references for the lead staff person for whom work has been accomplished, and briefly describe the type of service provided. Do not include current AGENCY staff as references. The Consultant and the lead staff person must grant permission to the AGENCY to contact the references and others who may have pertinent information regarding the Consultant's and the lead staff person's qualifications and experience to perform the services required by this RFP. The AGENCY may evaluate references at the AGENCY'S discretion.

E. OMWBE Certification (OPTIONAL AND NOT SCORED)

Include proof of certification issued by the Washington State Office of Minority and Women's Business Enterprises (OMWBE) if certified minority-owned firm or women-owned firm(s) will be participating on this project. For information: http://www.omwbe.wa.gov.

3.4. COST PROPOSAL

The maximum fee for this contract must be two hundred thousand dollars ($200,000) or less in order to be considered responsive to this RFP.

The evaluation process is designed to award this procurement not necessarily to the Consultant of least cost, but rather to the Consultant whose proposal best meets the requirements of this RFP. However, Consultants are encouraged to submit proposals which are consistent with state government efforts to conserve state resources.

A. Identification of Costs (SCORED)

Identify all costs in U.S. dollars including expenses to be charged for performing the services necessary to accomplish the objectives of the contract. The Consultant is to submit a fully detailed budget, including staff costs and any expenses necessary to accomplish the tasks and to produce the deliverables under the contract. Consultants are required to collect and pay Washington state sales and use taxes, as applicable.

Costs for subcontractors are to be broken out separately. Please note if any subcontractors are certified by the Office of Minority and Women's Business Enterprises.

B. Computation

The score for the cost proposal will be computed by dividing the lowest cost bid received by the Consultant's total cost. Then the resultant number will be multiplied by the maximum possible points for the cost section.

4. EVALUATION AND CONTRACT AWARD

4.1. EVALUATION PROCEDURE

Responsive proposals will be evaluated strictly in accordance with the requirements stated in this solicitation and any addenda issued. The evaluation of proposals shall be accomplished by an evaluation team(s), to be designated by the AGENCY, which will determine the ranking of the proposals.

AGENCY, at its sole discretion, may elect to select the top-scoring firms as finalists for an oral presentation.

The RFP Coordinator may contact the Consultant for clarification of any portion of the Consultant's proposal.

4.2. EVALUATION WEIGHTING AND SCORING

The following weighting and points will be assigned to the proposal for evaluation purposes:

Technical Proposal – 70%   70points

    Project Approach/Methodology   10 points (maximum)
    Quality of Work Plan   25 points (maximum)
    Project Schedule   10points (maximum)
    Project Deliverables   25points (maximum)

Management Proposal – 20%   20 points

    Project Team Structure and
        Internal Controls   5 points (maximum)
    Staff Qualifications/Experience   10 points (maximum)
    Experience of the Consultant   5 points (maximum)

Cost Proposal – 10%   10 points

TOTAL   **100 POINTS**

AGENCY reserves the right to award the contract to the Consultant whose proposal is deemed to be in the best interest of the AGENCY and the state of Washington.

4.3. ORAL PRESENTATIONS MAY BE REQUIRED

The AGENCY may, after evaluating the written proposals, elect to schedule oral presentations of the finalists. Should oral presentations become necessary, the AGENCY will contact the top-scoring firm(s) from the written evaluation to schedule a date, time, and location. Commitments made by the Consultant at the oral interview, if any, will be considered binding.

The scores from the written evaluation and the oral presentation combined together will determine the apparent successful contractor.

4.4. NOTIFICATION TO PROPOSERS

The AGENCY will notify the Apparently Successful Contractor of their selection in writing upon completion of the evaluation process. Individuals or firms whose proposals were not selected for further negotiation or award will be notified separately by e-mail.

4.5. DEBRIEFING OF UNSUCCESSFUL PROPOSERS

Any Consultant who has submitted a proposal and been notified that they were not selected for contract award may request a debriefing. The request for a debriefing conference must be received by the RFP Coordinator within three (3) business days after the Unsuccessful Consultant Notification is e-mailed to the Consultant. Debriefing requests must be received by the RFP Coordinator no later than 5:00 PM, local time, in Olympia, Washington on the third business day following the transmittal of the Unsuccessful Consultant Notification. The debriefing must be held within three (3) business days of the request.

Discussion at the debriefing conference will be limited to the following:

- Evaluation and scoring of the firm's proposal;
- Critique of the proposal based on the evaluation;
- Review of proposer's final score in comparison with other final scores without identifying the other firms.

Comparisons between proposals or evaluations of the other proposals will not be allowed. Debriefing conferences may be conducted in person or on the telephone and will be scheduled for a maximum of one hour.

4.6. PROTEST PROCEDURE

Protests may be made only by Consultants who submitted a response to this solicitation document and who have participated in a debriefing conference. Upon completing the debriefing conference, the Consultant is allowed three (3) business days to file a protest of the acquisition with the RFP Coordinator. Protests must be received by the RFP Coordinator no later than 4:30 PM, local time, in Olympia, Washington on the third business day following the debriefing. Protests may be submitted by e-mail, but must then be followed by the document with an original signature.

Consultants protesting this procurement shall follow the procedures described below. Protests that do not follow these procedures shall not be considered. This protest procedure constitutes the sole administrative remedy available to Consultants under this procurement.

All protests must be in writing, addressed to the RFP Coordinator, and signed by the protesting party or an authorized Agent. The protest must state the RFP number, the grounds for the protest with specific facts and complete statements of the action(s) being protested. A description of the relief or corrective action being requested should also be included.

Only protests stipulating an issue of fact concerning the following subjects shall be considered:

- A matter of bias, discrimination, or conflict of interest on the part of an evaluator;

- Errors in computing the score;

- Non-compliance with procedures described in the procurement document or AGENCY policy.

Protests not based on procedural matters will not be considered. Protests will be rejected as without merit if they address issues such as: 1) an evaluator's professional judgment on the

quality of a proposal, or 2) AGENCY'S assessment of its own or other agencies' needs or requirements.

Upon receipt of a protest, a protest review will be held by the AGENCY. The AGENCY Director, or an employee delegated by the Director who was not involved in the procurement, will consider the record and all available facts and issue a decision within five (5) business days of receipt of the protest. If additional time is required, the protesting party will be notified of the delay.

In the event a protest may affect the interest of another Consultant that also submitted a proposal, such Consultant will be given an opportunity to submit its views and any relevant information on the protest to the RFP Coordinator.

The final determination of the protest shall:

- Find the protest lacking in merit and uphold the AGENCY's action; or

- Find only technical or harmless errors in the AGENCY's acquisition process and determine the AGENCY to be in substantial compliance and reject the protest; or

- Find merit in the protest and provide the AGENCY options which may include:

  -- Correct the errors and re-evaluate all proposals; and/or

  -- Reissue the solicitation document and begin a new process; or

  -- Make other findings and determine other courses of action as appropriate.

If the AGENCY determines that the protest is without merit, the AGENCY will enter into a contract with the Apparent Successful Contractor. If the protest is determined to have merit, one of the alternatives noted in the preceding paragraph will be taken.

5. RFP EXHIBITS

Exhibit A   Certifications and Assurances
Exhibit B   Personal Service Contract Format including General Terms and Conditions (GT&Cs)
Exhibit C   GEAR UP Findings and Recommendations Report
Exhibit D   GEAR UP Website Elements Proposal

CERTIFICATIONS AND ASSURANCES

I/we make the following certifications and assurances as a required element of the proposal to which it is attached, understanding that the truthfulness of the facts affirmed here and the continuing compliance with these requirements are conditions precedent to the award or continuation of the related contract:

1. I/we declare that all answers and statements made in the proposal are true and correct.

2. The prices and/or cost data have been determined independently, without consultation, communication, or agreement with others for the purpose of restricting competition. However, I/we may freely join with other persons or organizations for the purpose of presenting a single proposal.

3. The attached proposal is a firm offer for a period of 60 days following receipt, and it may be accepted by the AGENCY without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 60-day period.

4. In preparing this proposal, I/we have not been assisted by any current or former employee of the state of Washington whose duties relate (or did relate) to this proposal or prospective contract, and who was assisting in other than his or her official, public capacity. If there are exceptions to these assurances, I/we have described them in full detail on a separate page attached to this document.

5. I/we understand that the AGENCY will not reimburse me/us for any costs incurred in the preparation of this proposal. All proposals become the property of the AGENCY, and I/we claim no proprietary right to the ideas, writings, items, or samples, unless so stated in this proposal.

6. Unless otherwise required by law, the prices and/or cost data which have been submitted have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by him/her prior to opening, directly or indirectly, to any other Proposer or to any competitor.

7. I/we agree that submission of the attached proposal constitutes acceptance of the solicitation contents and the attached sample contract and general terms and conditions. If there are any exceptions to these terms, I/we have described those exceptions in detail on a page attached to this document.

8. No attempt has been made or will be made by the Proposer to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.

9. I/we grant the AGENCY the right to contact references and other, who may have pertinent information regarding the ability of the Consultant and the lead staff person to perform the services contemplated by this RFP.

10. If any staff member(s) who will perform work on this contract has retired from the State of Washington under the provisions of the 2008 Early Retirement Factors legislation, his/her name(s) is noted on a separately attached page.

    We (circle one) **are / are not** submitting proposed Contract exceptions. (See Section 2.11, Contract and General Terms and Conditions.) If Contract exceptions are being submitted, I/we have attached them to this form.

    On behalf of the Consultant submitting this proposal, my name below attests to the accuracy of the above statement.

_____

Signature of Proposer

_____

Title   Date

Contract No. (Number)

**Contract for Personal Services
between the
State of Washington
Higher Education Coordinating Board
and
(Contractor)**

This Contract is made and entered into by and between the state of Washington, Higher Education Coordinating Board, hereinafter referred to as the "**AGENCY**", and the below named firm, hereinafter referred to as "**CONTRACTOR**."

(Contractor Name)

(address)

(city, state zip)

Phone: (Phone Number)

FAX: (Fax)

Email: (Email)

Federal TIN: (TIN #)

WA State UBI Number: (UBI #)

PURPOSE

The purpose of this contract is to develop a comprehensive College & Career Ready website for Washingtonians.

SCOPE OF WORK

A.   Exhibit A, attached hereto and incorporated by reference, contains the *General Terms and Conditions* governing work to be performed under this contract, the nature of the working relationship between the AGENCY and the CONTRACTOR, and specific obligations of both parties.

B.   The CONTRACTOR will provide services and staff, and otherwise do all things necessary for or incidental to the performance of work, as set forth below:
>   As included in the AGENCY'S Request for Proposals No. 13-RFP122, attached as Exhibit B, and the CONTRACTOR'S proposal dated (date), attached as Exhibit C.

C.   The CONTRACTOR shall produce the following written reports or other written documents (deliverables) by the dates indicated below.

Activity	*Deliverable*
Phase I – Research and Discovery May – June, 2012	
Initial meeting between AGENCY and consultant.	Summary of Meeting notes.
Research and review current website, collaterals and other communications materials; Research audience demographics.	Recommendations report.
Conduct focus groups to assess ease of use of content and features	Findings report.
Define application features and functionality.	Technical specifications.
Phase II Identity and Design Development May – June, 2012	
Create attitude boards for new identity.	At least 4 options for identity logo/styles.
Develop creative brief for new brand.	Creative brief.
Develop initial website design concepts.	3 brief concepts.
Develop high-level information architecture & detailed content outline.	Content map.
Test and assess usability.	Findings report.
Draft high-level narrative content.	Subject area content.
Develop content and social media strategy.	Communications plan.

Phase III – Technical Development July – September 2012	
Refine chosen website design concept.	Website shell pages.
Implement core functionality of the website.	Functional pre-production site.
Integration of content into application framework.	Functional pre-production site.
Test and assess usability.	Findings Report
Phase IV – User Testing & Website Launch October – December 2012	
Refine key messages, narrative content, & functionality.	Refined website.
Provide site management training to HECB staff.	Training documentation.
Launch website.	Project completion.

All written reports required under this contract must be delivered to Weiya Liang, the Contract Manager, in accordance with the schedule above.

PERIOD OF PERFORMANCE

The period of performance under this contract will be from May 22, 2012, or date of execution, whichever is later, throughDecember 31, 2012.

OFM FILING REQUIREMENT

10-Day Filing

The provisions of Chapter 39.29 RCW require the AGENCY to file this personal service contract with the Office of Financial Management (OFM) for approval. No contract so filed is effective nor shall work commence under it until the tenth (10th) working day following the date of filing, subject to OFM approval. In the even OFM fails to approve the contract, the contract shall be null and void.

COMPENSATION

Total compensation payable to CONTRACTOR for satisfactory performance of the work under this contract shall not exceed two hundred thousand dollars ($200,000) for the performance of all things necessary for or incidental to the performance of work as set forth in the Scope of Work.

CONTRACTOR'S compensation for services rendered shall be based on the following rates or in accordance with the following terms:

Activity	Deliverables	Compensation
Phase I – Research & Discovery	Recommendations report; Technical specifications.	
Phase II – Identity & Design Development	Logo & identity; Creative brief; Content Map; Communications Plan.	
Phase III – Technical Development	User testing findings report; Completed website.	
Phase IV – User Testing & Website Launch	User testing; launch completed site.	

The following deliverables are expected as performance measures:

- Phase I complete within X weeks of the contract start date.
- Phase II complete within X weeks of the contract start date.
- Phase III complete within X weeks of the contract start date.
- Phase IV complete by December 31, 2012.

BILLING PROCEDURES AND PAYMENT

AGENCY will pay CONTRACTOR upon acceptance of services provided and receipt of properly completed invoices, which shall be submitted to the Contract Manager not more often than monthly.
Payment will be made upon completion of specific develiverables as outlined above.

The invoices shall describe and document, to the AGENCY'S satisfaction, a description of the work performed, the progress of the project, and fees. The invoice shall include the contract reference number 13-122. If expenses are invoiced, provide a detailed breakdown of each type. A receipt must accompany any single expenses in the amount of $50.00 or more in order to receive reimbursement.

Payment shall be considered timely if made by the AGENCY within thirty (30) calendar days after receipt of properly completed invoices. Payment shall be sent to the address designated by the CONTRACTOR.

The AGENCY may, in its sole discretion, terminate the contract or withhold payments claimed by the CONTRACTOR for services rendered if the CONTRACTOR fails to satisfactorily comply with any term or condition of this contract.

No payments in advance or in anticipation of services or supplies to be provided under this contract shall be made by the AGENCY.

The AGENCY shall withhold 10 percent from each payment until acceptance by the AGENCY of the final report (or completion of the project, etc.)

CONTRACT MANAGEMENT

The Contract Manager for each of the parties shall be the contact person for all communications and billings regarding the performance of this contract.

CONTRACTOR Contract Manager	AGENCY Contract Manager
(Enter Contract Manager's Name)	Weiya Liang
(Enter Name of CONTRACTOR)	Higher Education Coordinating Board
(Enter CONTRACTOR Address)	917 Lakeridge Way SW
(Enter City, State & Zip Code)	P.O. Box 43430
	Olympia, WA 98504-3430
Phone : ((Phone)) (Number)	*Phone:* (360) 753-7884
Fax: ((Fax)) (Number)	*Fax:* (360) 753-7808
Email address: (Email)	*Email address:* weiyal@hecb.wa.gov

INSURANCE

The CONTRACTOR shall provide insurance coverage as set out in this section The intent of the required insurance is to protect the state should there be any claims, suits, actions, costs, damages or expenses arising from any negligent or intentional act or omission of the CONTRACTOR or subcontractor, or agents of either, while performing under the terms of this contract.

The CONTRACTOR shall provide insurance coverage, which shall be maintained in full force and effect during the term of this contract, as follows:

1. Commercial General Liability Insurance Policy. Provide a Commercial General Liability Insurance Policy, including contractual liability, in adequate quantity to protect against legal liability arising out of contract activity but no less than $1,000,000 per occurrence.

   Additionally, the CONTRACTOR is responsible for ensuring that any subcontractors provide adequate insurance coverage for the activities arising out of subcontracts.

2. Automobile Liability. In the event that services delivered pursuant to this contract involve the use of vehicles, either owned or unowned by the CONTRACTOR, automobile liability insurance shall be required. The minimum limit for automobile liability is:

   > $1,000,000 per occurrence, using a Combined Single Limit for
   > bodily injury and property damage.

3. The insurance required shall be issued by an insurance company/ies authorized to do business within the state of Washington, and shall name the state of Washington, its agents and employees as additional insureds under the insurance policy/ies.

All policies shall be primary to any other valid and collectable insurance. CONTRACTOR shall instruct the insurers to give AGENCY thirty (30) calendar days advance notice of any insurance cancellation.

CONTRACTOR shall submit to AGENCY within fifteen (15) calendar days of the contract effective date, a certificate of insurance that outlines the coverage and limits defined in the *Insurance* section. CONTRACTOR shall submit renewal certificates as appropriate during the term of the contract.

ASSURANCES

AGENCY and the CONTRACTOR agree that all activity pursuant to this contract will be in accordance with all the applicable current federal, state and local laws, rules, and regulations.

ORDER OF PRECEDENCE

Each of the exhibits listed below is by this reference hereby incorporated into this contract. In the event of an inconsistency in this contract, the inconsistency shall be resolved by giving precedence in the following order:

1. Applicable federal and state of Washington statutes and regulations
2. Special terms and conditions as contained in this basic contract instrument
3. Exhibit A – General Terms and Conditions
4. Exhibit B – Request for Proposals No. 13-RFP122
5. Exhibit C – Contractor's Proposal dated (Date)
6. Any other provision, term or material incorporated herein by reference or otherwise incorporated

ENTIRE AGREEMENT

This contract, including referenced exhibits, represents all the terms and conditions agreed upon by the parties. No other statements or representations, written or oral, shall be deemed a part hereof.

CONFORMANCE

If any provision of this contract violates any statute or rule of law of the state of Washington, it is considered modified to conform to that statute or rule of law.

APPROVAL

This contract shall be subject to the written approval of the AGENCY'S authorized representative and shall not be binding until so approved. The contract may be altered, amended, or waived only by a written amendment executed by both parties.

THIS CONTRACT,consisting of (no. of pgs.) pages and (no. of attach.) attachment(s), is executed by the persons signing below, who warrant they have the authority to execute the contract.

[CONTRACTOR'S NAME]   **Higher Education Coordinating Board**

_____   _____
Signature   Signature

_____   _____
Title   Date   Title   Date

APPROVED AS TO FORM:

_____
Assistant Attorney General

_____
Date

GENERAL TERMS AND CONDITIONS

DEFINITIONS

As used throughout this contract, the following terms shall have the meaning set forth below:

A. "AGENCY" shall mean the Higher Education Coordinating Board of the State of Washington, any division, section, office, unit or other entity of the AGENCY, or any of the officers or other officials lawfully representing that AGENCY.

B. "AGENT" shall mean the Executive Director of the Higher Education Coordinating Board, and/or the delegate authorized in writing to act on the Executive Director's behalf.

C. "CONTRACTOR" shall mean that firm, provider, organization, individual or other entity performing service(s) under this contract, and shall include all employees of the CONTRACTOR.

D. "SUBCONTRACTOR" shall mean one not in the employment of the CONTRACTOR, who is performing all or part of those services under this contract under a separate contract with the CONTRACTOR. The terms "SUBCONTRACTOR" and "SUBCONTRACTORS" means SUBCONTRACTOR(s) in any tier.

ACCESS TO DATA

In compliance with RCW 39.29.080, the CONTRACTOR shall provide access to data generated under this contract to AGENCY, the Joint Legislative Audit and Review Committee, and the State Auditor at no additional cost. This includes access to all information that supports the findings, conclusions, and recommendations of the CONTRACTOR'S reports, including computer models and methodology for those models.

ADVANCE PAYMENTS PROHIBITED

No payments in advance of or in anticipation of goods or services to be provided under this contract shall be made by the AGENCY.

AMENDMENTS

This contract may be amended by mutual agreement of the parties. Such amendments shall not be binding unless they are in writing and signed by personnel authorized to bind each of the parties.

AMERICANS WITH DISABILITIES ACT (ADA) OF 1990, PUBLIC LAW 101-336, also referred to as the "ADA" 28 CFR Part 35

The CONTRACTOR must comply with the ADA, which provides comprehensive civil rights protection to individuals with disabilities in the areas of employment, public accommodations, state and local government services, and telecommunications.

ASSIGNMENT

Neither this contract, nor any claim arising under this contract, shall be transferred or assigned by the CONTRACTOR without prior written consent of the AGENCY.

ATTORNEYS' FEES

In the event of litigation or other action brought to enforce contract terms, each party agrees to bear its own attorney fees and costs.

CONFIDENTIALITY/SAFEGUARDING OF INFORMATION

The CONTRACTOR shall not use or disclose any information concerning the AGENCY, or information that may be classified as confidential, for any purpose not directly connected with the administration of this contract, except with prior written consent of the AGENCY, or as may be required by law.

CONFLICT OF INTEREST

Notwithstanding any determination by the Executive Ethics Board or other tribunal, the AGENCY may, in its sole discretion, by written notice to the CONTRACTOR terminate this contract if it is found after due notice and examination by the AGENT that there is a violation of the Ethics in Public Service Act, Chapter 42.52 RCW; or any similar statute involving the CONTRACTOR in the procurement of, or performance under this contract.

In the event this contract is terminated as provided above, the AGENCY shall be entitled to pursue the same remedies against the CONTRACTOR as it could pursue in the event of a breach of the contract by the CONTRACTOR. The rights and remedies of the AGENCY provided for in this clause shall not be exclusive and are in addition to any other rights and remedies provided by law. The existence of facts upon which the AGENT makes any determination under this clause shall be an issue and may be reviewed as provided in the "Disputes" clause of this contract.

COPYRIGHT PROVISIONS

Unless otherwise provided, all materials produced under this contract shall be considered "works for hire" as defined by the U.S. Copyright Act and shall be owned by the AGENCY. The AGENCY shall be considered the author of such materials. In the event the materials are not considered "works for hire" under the U.S. Copyright laws, CONTRACTOR hereby irrevocably assigns all right, title, and interest in materials, including all intellectual property rights, to the AGENCY effective from the moment of creation of such materials.

Materials means all items in any format and includes, but is not limited to, data, reports, documents, pamphlets, advertisements, books, magazines, surveys, studies, computer programs, films, tapes, and/or sound reproductions. Ownership includes the right to copyright, patent, register and the ability to transfer these rights.

For materials that are delivered under the contract, but that incorporate pre-existing materials not produced under the contract, CONTRACTOR hereby grants to the AGENCY a nonexclusive, royalty-free, irrevocable license (with rights to sublicense others) in such materials to translate, reproduce, distribute, prepare derivative works, publicly perform, and publicly display. The CONTRACTOR warrants and represents that CONTRACTOR has all rights and permissions, including intellectual property rights, moral rights and rights of publicity, necessary to grant such a license to the AGENCY.

The CONTRACTOR shall exert all reasonable effort to advise the AGENCY, at the time of delivery of materials furnished under this contract, of all known or potential invasions of privacy contained therein and of any portion of such document that was not produced in the performance of this contract.

The AGENCY shall receive prompt written notice of each notice or claim of infringement received by the CONTRACTOR with respect to any data delivered under this contract. The AGENCY shall have the right to modify or remove any restrictive markings placed upon the data by the CONTRACTOR.

COVENANT AGAINST CONTINGENT FEES

The CONTRACTOR warrants that no person or selling agent has been employed or retained to solicit or secure this contract upon an agreement or understanding for a commission, percentage, brokerage or contingent fee, excepting bona fide employees or bona fide established agents maintained by the CONTRACTOR for securing business.

The AGENCY shall have the right, in the event of breach of this clause by the CONTRACTOR, to annul this contract without liability or, in its discretion, to deduct from the contract price or consideration or recover by other means the full amount of such commission, percentage, brokerage or contingent fee.

DISALLOWED COSTS

The Contractor is responsible for any audit exceptions or disallowed costs incurred by its own organization or that of its Subcontractors.

DISPUTES

Except as otherwise provided in this contract, when a dispute arises between the parties and it cannot be resolved by direct negotiation, either party may request a dispute hearing with AGENT.

1. The request for a dispute hearing must:
    - Be in writing;
    - State the disputed issue(s);
    - State the relative positions of the parties;
    - State the CONTRACTOR'S name, address, and contract number; and
    - Be mailed to the AGENT and the other party's (respondent's) contract manager within 3 working calendar days after the parties agree that they cannot resolve the dispute.

2. The respondent shall send a written answer to the requester's statement to both the agent and the requester within 5 working calendar days.

3. The AGENT shall review the written statements and reply in writing to both parties within 10 working days. The AGENT may extend this period if necessary by notifying the parties.

4. The parties agree that this dispute process shall precede any action in a judicial or quasi-judicial tribunal.

Nothing in this contract shall be construed to limit the parties' choice of a mutually acceptable ADR method in addition to the dispute resolution procedure outlined above.

DUPLICATE PAYMENT

The AGENCY shall not pay the CONTRACTOR, if the CONTRACTOR has charged or will charge the State of Washington or any other party under any other contract or agreement, for the same services or expenses.

GOVERNING LAW

This contract shall be construed and interpreted in accordance with the laws of the State of Washington, and the venue of any action brought hereunder shall be in the Superior Court for Thurston County.

INDEMNIFICATION

To the fullest extent permitted by law, CONTRACTOR shall indemnify, defend, and hold harmless State, agencies of State and all officials, agents and employees of State, from and against all claims for injuries or death arising out of or resulting from the performance of the contract. "Claim," as used in this contract, means any financial loss, claim, suit, action, damage, or expense, including but not limited to attorney's fees, attributable for bodily injury, sickness, disease, or death, or injury to or destruction of tangible property including loss of use resulting therefrom.

CONTRACTOR'S obligations to indemnify, defend, and hold harmless includes any claim by CONTRACTORS' agents, employees, representatives, or any subcontractor or its employees.

CONTRACTOR expressly agrees to indemnify, defend, and hold harmless the State for any claim arising out of or incident to CONTRACTOR'S or any subcontractor's performance or failure to perform the contract. CONTRACTOR'S obligation to indemnify, defend, and hold harmless the State shall not be eliminated or reduced by any actual or alleged concurrent negligence of State or its agents, agencies, employees and officials.

CONTRACTOR waives its immunity under Title 51 RCW to the extent it is required to indemnify, defend and hold harmless State and its agencies, officials, agents or employees.

INDEPENDENT CAPACITY OF THE CONTRACTOR

The parties intend that an independent contractor relationship will be created by this contract. The CONTRACTOR and his or her employees or agents performing under this contract are not employees or agents of the AGENCY. The CONTRACTOR will not hold himself/herself out as or claim to be an officer or employee of the AGENCY or of the State of Washington by reason hereof, nor will the CONTRACTOR make any claim of right, privilege or benefit that would accrue to such employee under law. Conduct and control of the work will be solely with the CONTRACTOR.

INDUSTRIAL INSURANCE COVERAGE

The CONTRACTOR shall comply with the provisions of Title 51 RCW, Industrial Insurance. If the CONTRACTOR fails to provide industrial insurance coverage or fails to pay premiums or penalties on behalf of its employees, as may be required by law, AGENCY may collect from the CONTRACTOR the full amount payable to the Industrial Insurance accident fund. The AGENCY may deduct the amount owed by the CONTRACTOR to the accident fund from the amount payable to the CONTRACTOR by the AGENCY under this contract, and transmit the deducted amount to the Department of Labor and Industries, (L&I) Division of Insurance Services. This provision does not waive any of L&I's rights to collect from the CONTRACTOR.

LICENSING, ACCREDITATION AND REGISTRATION

The CONTRACTOR shall comply with all applicable local, state, and federal licensing, accreditation and registration requirements/standards, necessary for the performance of this contract.

LIMITATION OF AUTHORITY

Only the AGENT or AGENT'S delegate by writing (delegation to be made prior to action) shall have the express, implied, or apparent authority to alter, amend, modify, or waive any clause or condition of this contract. Furthermore, any alteration, amendment, modification, or waiver or any clause or condition of this contract is not effective or binding unless made in writing and signed by the AGENT.

NONCOMPLIANCE WITH NONDISCRIMINATION LAWS

In the event of the CONTRACTOR'S non-compliance or refusal to comply with any nondiscrimination law, regulation, or policy, this contract may be rescinded, canceled or terminated in whole or in part, and the CONTRACTOR may be declared ineligible for further contracts with the AGENCY. The CONTRACTOR shall, however, be given a reasonable time in which to cure this noncompliance. Any dispute may be resolved in accordance with the "Disputes" procedure set forth herein.

NONDISCRIMINATION

During the performance of this contract, the CONTRACTOR shall comply with all federal and state nondiscrimination laws, regulations and policies.

PRIVACY

Personal information including, but not limited to, "Protected Health Information," collected, used, or acquired in connection with this contract shall be protected against unauthorized use, disclosure, modification or loss. CONTRACTOR shall ensure its directors, officers, employees, subcontractors or agents use personal information solely for the purposes of accomplishing the services set forth herein. CONTRACTOR and its subcontractors agree not to release, divulge, publish, transfer, sell or otherwise make known to unauthorized persons personal information without the express written consent of the agency or as otherwise required by law.

Any breach of this provision may result in termination of the contract and the demand for return of all personal information. The CONTRACTOR agrees to indemnify and hold harmless the AGENCY for any damages related to the CONTRACTOR'S unauthorized use of personal information.

PUBLICITY

The CONTRACTOR agrees to submit to the AGENCY all advertising and publicity matters relating to this contract wherein the AGENCY'S name is mentioned or language used from which the connection of the AGENCY'S name may, in the AGENCY'S judgment, be inferred or implied. The CONTRACTOR agrees not to publish or use such advertising and publicity matters without the prior written consent of the AGENCY.

RECORDS MAINTENANCE

The CONTRACTOR shall maintain books, records, documents, data and other evidence relating to this contract and performance of the services described herein, including but not limited to accounting procedures and practices that sufficiently and properly reflect all direct and indirect costs of any nature expended in the performance of this contract.

CONTRACTOR shall retain such records for a period of six years following the date of final payment. At no additional cost, these records, including materials generated under the contract, shall be subject at all reasonable times to inspection, review or audit by the AGENCY, personnel duly authorized by the AGENCY, the Office of the State Auditor, and federal and state officials so authorized by law, regulation or agreement.

If any litigation, claim or audit is started before the expiration of the six (6) year period, the records shall be retained until all litigation, claims, or audit findings involving the records have been resolved.

REGISTRATION WITH DEPARTMENT OF REVENUE

The CONTRACTOR shall complete registration with the Washington State Department of Revenue and be responsible for payment of all taxes due on payments made under this contract.

RIGHT OF INSPECTION

The CONTRACTOR shall provide right of access to its facilities to the AGENCY, or any of its officers, or to any other authorized agent or official of the state of Washington or the federal government, at all reasonable times, in order to monitor and evaluate performance, compliance, and/or quality assurance under this contract.

SAVINGS

In the event funding from state, federal, or other sources is withdrawn, reduced, or limited in any way after the effective date of this contract and prior to normal completion, the AGENCY may terminate the contract under the "Termination for Convenience" clause, without the ten-day notice requirement, subject to renegotiation at the AGENCY'S discretion under those new funding limitations and conditions.

SEVERABILITY

The provisions of this contract are intended to be severable. If any term or provision is illegal or invalid for any reason whatsoever, such illegality or invalidity shall not affect the validity of the remainder of the contract.

SITE SECURITY

While on AGENCY premises, CONTRACTOR, its agents, employees, or subcontractors shall conform in all respects with physical, fire or other security policies or regulations.

SUBCONTRACTING

Neither the CONTRACTOR nor any SUBCONTRACTOR shall enter into subcontracts for any of the work contemplated under this contract without obtaining prior written approval of the AGENCY. In no event shall the existence of the subcontract operate to release or reduce the liability of the contractor to the Department for any breach in the performance of the contractor's duties. This clause does not include contracts of employment between the contractor and personnel assigned to work under this contract.

Additionally, the CONTRACTOR is responsible for ensuring that all terms, conditions, assurances and certifications set forth in this agreement are carried forward to any subcontracts. CONTRACTOR and its subcontractors agree not to release, divulge, publish, transfer, sell or otherwise make known to unauthorized persons personal information without the express written consent of the agency or as provided by law.

TAXES

All payments accrued because of payroll taxes, unemployment contributions, any other taxes, insurance or other expenses for the CONTRACTOR or its staff shall be the sole responsibility of the CONTRACTOR.

TERMINATION FOR CAUSE

In the event the AGENCY determines the CONTRACTOR has failed to comply with the conditions of this contract in a timely manner, the AGENCY has the right to suspend or terminate this contract. Before suspending or terminating the contract, the AGENCY shall notify the CONTRACTOR in writing of the need to take corrective action. If corrective action is not taken within 30 calendar days, the contract may be terminated or suspended.

In the event of termination or suspension, the CONTRACTOR shall be liable for damages as authorized by law including, but not limited to, any cost difference between the original contract and the replacement or cover contract and all administrative costs directly related to the replacement contract, e.g., cost of the competitive bidding, mailing, advertising and staff time.

The AGENCY reserves the right to suspend all or part of the contract, withhold further payments, or prohibit the CONTRACTOR from incurring additional obligations of funds during investigation of the alleged compliance breach and pending corrective action by the CONTRACTOR or a decision by the AGENCY to terminate the contract. A termination shall be deemed a "Termination for Convenience" if it is determined that the CONTRACTOR: (1) was not in default; or (2) failure to perform was outside of his or her control, fault or negligence.
The rights and remedies of the AGENCY provided in this contract are not exclusive and are, in addition to any other rights and remedies, provided by law.

TERMINATION FOR CONVENIENCE

Except as otherwise provided in this contract, the AGENCY may, by 10 calendar days written notice, beginning on the second day after the mailing, terminate this contract, in whole or in part. If this contract is so terminated, the AGENCY shall be liable only for payment required under the terms of this contract for services rendered or goods delivered prior to the effective date of termination.

TERMINATION PROCEDURES

Upon termination of this contract, the AGENCY, in addition to any other rights provided in this contract, may require the CONTRACTOR to deliver to the AGENCY any property specifically produced or acquired for the performance of such part of this contract as has been terminated. The provisions of the "Treatment of Assets" clause shall apply in such property transfer.

The AGENCY shall pay to the CONTRACTOR the agreed upon price, if separately stated, for completed work and services accepted by the AGENCY, and the amount agreed upon by the CONTRACTOR and the AGENCY for (i) completed work and services for which no separate price is stated, (ii) partially completed work and services, (iii) other property or services that are accepted by the AGENCY, and (iv) the protection and preservation of property, unless the termination is for default, in which case the AGENT shall determine the extent of the liability of the AGENCY. Failure to agree with such determination shall be a dispute within the meaning of the "Disputes" clause of this contract. The AGENCY may withhold from any amounts due the CONTRACTOR such sum as the AGENT determines to be necessary to protect the AGENCY against potential loss or liability.

The rights and remedies of the AGENCY provided in this section shall not be exclusive and are in addition to any other rights and remedies provided by law or under this contract.

After receipt of a notice of termination, and except as otherwise directed by the AGENT, the CONTRACTOR shall:

1. Stop work under the contract on the date, and to the extent specified, in the notice;

2. Place no further orders or subcontracts for materials, services, or facilities except as may be necessary for completion of such portion of the work under the contract that is not terminated;

3. Assign to the AGENCY, in the manner, at the times, and to the extent directed by the AGENT, all of the rights, title, and interest of the CONTRACTOR under the orders and subcontracts so terminated, in which case the AGENCY has the right, at its discretion, to settle or pay any or all claims arising out of the termination of such orders and subcontracts;

4. Settle all outstanding liabilities and all claims arising out of such termination of orders and subcontracts, with the approval or ratification of the AGENT to the extent AGENT may require, which approval or ratification shall be final for all the purposes of this clause;

5. Transfer title to the AGENCY and deliver in the manner, at the times, and to the extent directed by the AGENT any property which, if the contract had been completed, would have been required to be furnished to the AGENCY;

6. Complete performance of such part of the work as shall not have been terminated by the AGENT; and

7. Take such action as may be necessary, or as the AGENT may direct, for the protection and preservation of the property related to this contract, which is in the possession of the CONTRACTOR and in which the AGENCY has or may acquire an interest.

TREATMENT OF ASSETS

A. Title to all property furnished by the AGENCY shall remain in the AGENCY. Title to all property furnished by the CONTRACTOR, for the cost of which the CONTRACTOR is entitled to be reimbursed as a direct item of cost under this contract, shall pass to and vest in the AGENCY upon delivery of such property by the CONTRACTOR. Title to other property, the cost of which is reimbursable to the CONTRACTOR under this contract, shall pass to and vest in the AGENCY upon (i) issuance for use of such property in the performance of this contract, or (ii) commencement of use of such property in the performance of this contract, or (iii) reimbursement of the cost thereof by the AGENCY in whole or in part, whichever first occurs.

B. Any property of the AGENCY furnished to the CONTRACTOR shall, unless otherwise provided herein or approved by the AGENCY, be used only for the performance of this contract.

C. The CONTRACTOR shall be responsible for any loss or damage to property of the AGENCY that results from the negligence of the CONTRACTOR or which results from the failure on the part of the CONTRACTOR to maintain and administer that property in accordance with sound management practices.

D. If any AGENCY property is lost, destroyed or damaged, the CONTRACTOR shall immediately notify the AGENCY and shall take all reasonable steps to protect the property from further damage.

E. The CONTRACTOR shall surrender to the AGENCY all property of the AGENCY prior to settlement upon completion, termination or cancellation of this contract

F. All reference to the CONTRACTOR under this clause shall also include CONTRACTOR'S employees, agents or SUBCONTRACTORS.

WAIVER

Waiver of any default or breach shall not be deemed a waiver of any subsequent default or breach. Any waiver shall not be construed to be a modification of the terms of this contract unless stated to be such in writing and signed by authorized representative of the AGENCY.

EXHIBIT C

Findings & Recommendations Report

GEAR UP FINDINGS & RECOMMENDATIONS

Eos Strategic and TrueGood Creative

Table of Contents

INTRODUCTION

The recommendations that follow are drawn from the findings discovered in our research and our previous experience in strategic communications. These recommendations incorporate feedback from GEAR UP program staff. They will be used as the foundation for completing the project, including the communications plan and recommendations for two requests for proposals.

The findings are drawn from research conducted by Eos Strategic and TrueGood Creative. Research included the following:

- Two focus groups with high school seniors in GEAR UP
- Interviews with three GEAR UP teachers/coordinators, two onsite and one by phone
- Three phone interviews with parents of former GEAR UP students
- Two phone interviews with GEAR UP alumni
- Reviews of the GEAR UP Survey on Technology & Social Media and the Hear Us Out research conducted by Seattle Public Schools students, sponsored by What Kids Can Do and the Alliance for Education
- Review of the current GEAR UP website and print materials
- Online market research including a scan of approximately 20 college-preparedness websites as well as several model sites from other sectors

We have aggregated our findings from each of these sources and categorized them into themed sections. Our recommendations are also presented according to these same themes:

1. Communications plan for GEAR UP and goals for outreach
2. Marketing and outreach for the website
3. Online tools, including key features

It's important to note that many findings will be of no surprise to experienced GEAR UP staff. Such findings should be seen as confirmation of what is already known or suspected. Other findings may well provide new insights and suggestions for future actions. Taken together and seen from the project team's third party point of view, these findings are the basis of our recommendations.

RECOMMENDATIONS

A. GEAR UP Communications Planning & Outreach Goals

The following assertions and recommendations are intended to respond to the first and third bullets of the request for bids: advice for GEAR UP programs on reaching the target audience, and advice on honing the GEAR UP Washington communications strategy.

Educators Are Key

Students from middle and high school prepare for college effectively when teachers and other educators show them the way. While families and others in the community may talk about going to college, no group has a greater impact than teachers. They are positioned and equipped to help students visualize and work toward this goal. And they can shepherd them through the entire experience, starting in middle school and continuing through the college application and FAFSA processes.

It's remarkable how successful GEAR UP Washington has been given that our research shows little use of the workbooks and website by students and their families. GEAR UP teachers and coordinators have made it work by advising, cajoling and encouraging their students and working hard to involve parents. And they have used the workbooks as guides.

As every teacher will tell you, their work can be reinforced greatly by involved families. GEAR UP teachers and coordinators work hard to engage the families of their students and should continue to do so.

User Experience & Access to Good Information is Critical

A new online destination for college planning and preparation should offer the best of what GEAR UP provides on the ground (support, inspiration, information and guidance) plus new features that would address some of the issues we touched on in our interviews and focus group sessions. Specifically, these primary goals should guide both the concept and product development efforts:

- Serve all students/families/teachers in Washington state, especially those who don't have access to the full GEAR UP program.

- Provide solutions to stated problems: A better way to browse and access online resources, and timeline management for students and parents.

- Offer "real" stories and advice from GEAR UP alumni (college students, parents).

- Better position workbook content so that it is searchable and accessible to key audiences, especially those students and educators who are not part of GEAR UP.

- Offer multilingual content (ideally page content in specific language sections, but at least provide a set of resources for key demographics).

- Enable participation and social validation/reward through sharing, peer-to-peer interactions and/or a gamification feedback system.

- Launch with a flexible information architecture, design and feature set that can scale over time.

- Create an experience that feels vibrant, authentic and provides clear, compelling pathways for different audiences to access key information.

1. Recommendations for GEAR UP Staff

Website Content Development (pre-launch)
In addition to participating in a comprehensive discovery process with the chosen vendor, GEAR UP staff will need to engage in a significant content development effort in support of the website development project. While we do recommend utilizing a consultant to draft high-level page content, the following goals and tasks must be completed by GEAR UP staff before a new website can launch:

- Review and revise the current workbooks and identify workbook elements for the website.

- Source, categorize and integrate new resources for the Resource Portal.

- Create a concept and a publishing model for the alumni blog journal.

- Seed content for the calendar system.

- Seed content for the educator group(s).

- Seed blog/news content (approximately 5 posts).

- Establish an over-arching editorial and content maintenance schedule that reflects your chosen content strategy (see appendix B for an example).

Content Strategy, Curation & Website Maintenance (ongoing)
A new, more robust website system with community features and a comprehensive, qualified Resource Portal will necessitate ongoing care and content creation from GEAR UP staff. Your editorial and content maintenance schedule should drive the publication of fresh information and ensure the efficacy of any new interactive features. While we anticipate that a portion of the website content can be community sourced (submitted by educators), GEAR UP will need to interact with the website and its users on a daily basis. Below is a break down of activities based on tasks that must be accomplished in order to maintain the website content features. We have also included a list of "nice to have" activities that would help to raise your online profile and position this new website/identity as an essential resource and thought leader for college readiness information and ideas.

Must Haves

- Resources and calendar events will need to be updated on a weekly basis. This can be accomplished by creating new resources/events, aggregating information from other sources and encouraging educators to share/submit their own resources/events. Specifically, GEAR UP can scan for new information using social media and by subscribing to RSS feeds and Google Alerts.

- In general, it will be necessary for staff to seed content in the educator forums.

- A moderation and/or approval process should be established for any content contributed by non-staff members. Staff will monitor conversations and submissions and respond to inquiries on a regular basis.

- Staff will need to monitor site functionality and submit bug reports to tech support. A technical development firm should be retained on an hourly or quarterly basis to perform basic maintenance and lend support, as needed.

- On a quarterly basis, staff should analyze website statistics, address emerging trends and evaluate feedback from website users. Goals and strategies should adapt and scale, and, as needed, adjustments to static page content should be made. (Note: GEAR UP may want to have the technical development firm generate Google Analytics reports.)

Nice to Haves

- Narrative content and social media channels should be kept fresh. We recommend a weekly or monthly "News/Editorial" blog. The "News/Editorial" blog can offer original content generated by staff or it can repurpose and share external news or articles.

- GEAR UP may want to generate a quarterly email to educators who have subscribed via the new website.

- An initial content strategy should guide your social media efforts and clarify where to push and where to pull information. Regardless of where you choose to be, it will be necessary to keep your profiles active and interactive.

Training & Engagement for GEAR UP Educators

Every GEAR UP educator should be trained to use the new website so that they can serve as a guide for students and parents. The goal is to ensure that educators incorporate this resource into their program efforts and make sure that students and families use the online tools regularly.

This new website will expand and adapt over time and educators will be key to understanding what is working and what is not. GEAR UP staff can stay connected to educators through the following efforts:

- Notify educators about changes to website content and functionality through enewsletters and/or an RSS feed.

- Maintain a forum for educators to share experiences and techniques that work as well as approaches that don't work as well.

- Survey educators on the effectiveness of the website and identify any problems that should be addressed.

- Experiment with online videoconferences and online presentations to help groups of educators who may be new to the resource or in need of advice or training.

GEAR UP educators will also need to be trained to use other key resources such as WOIS, Career Cruising, Skyward and anything OSPI develops. These resources will be available on the new GEAR UP Resource Portal but will too often go unused unless educators understand how to use them to supplement GEAR UP resources.

Redefine & Reiterate Messaging

The new website will require a name and an identity that is different from GEAR UP Washington. This will allow GEAR UP to market the offering to educators and students who are not connected to GEAR UP or who are affiliates of other programs.

- A naming process should be facilitated by the marketing firm and vetted for trademark conflicts. The firm should also research and propose web domains.

- GEAR UP educators need to be informed of the new identity and understand the reasons for it.

Overall, GEAR UP should continue using simple, straightforward messages that were developed for their key audiences. And it is critical that messages remain consistent across all media and trainings. However, a review and some refinement of the messaging would be worthwhile and GEAR UP will need to determine whether or not the same messages translate to the new website identity.

- Educators: YOUR STUDENTS NEED TO GO TO COLLEGE. YOU CAN HELP THEM SUCCEED.

- Middle School Students: YOU CAN GO TO COLLEGE. BUT YOU NEED TO PLAN NOW.

- High School Students: YOU HAVE OPTIONS FOR COLLEGE. BUT YOU NEED A PLAN.

- Families: YOUR STUDENT HAS WHAT IT TAKES TO GET TO COLLEGE.

Refine Relationships & Cultivate Partnerships

The success of the new website and the features we propose are somewhat dependant on GEAR UP's ability to strengthen alliances with other programs and affiliated organizations. From raising awareness to sharing resources, GEAR UP and its education sector affiliates will need to work together to get the word out and help drive traffic to the new website. It will be critical for GEAR UP to promote this effort as one that will serve everyone in Washington state, not just those who receive GEAR UP funding.

2. Recommendations for GEAR UP Educators

Effective use of the new website and the online resources connected to it will free up time for GEAR UP educators to spend on the crucial mentoring of individual students. The website tools will help students manage many important tasks, but individual, personal attention is key to students' successful preparation for college.

That said, GEAR UP will need to communicate that the new website has been created to solve problems and support educators in their daily efforts to serve students and families. Educators must grasp that the tools and resources will make it easier for students to track deadlines and their progress toward major milestones. This will be especially important in grades 9 through 12 as deadlines and time management become critical.

The following tactics should be considered to help raise awareness and foster participation:

- Make the new website the default home page for all career center computer browsers.

- Set up a table in the hallway during parent teacher conferences and catch parents, sign them up, or at least give them a flyer with information and the website address.

- Organize dinners or potlucks for families where GEAR UP and the importance of preparing for college are discussed. Help families sign up for an account and, if possible, familiarize them with how the website works.

- Make contact with local community college teachers of ESL and basic adult education. Arrange to present information on GEAR UP and college preparation to parents in those classes.

- Email families with key information such as SAT/ACT deadlines, FAFSA workshops, WashBoard scholarship searches and college application deadlines and encourage them to use the website.

- Present the website to the entire school staff during back to school in service days to raise awareness and gain support.

B. Marketing & Outreach for the Website

1. Marketing to non-GEAR UP Educators

Educators in middle and high school will be the primary ambassadors of the new website for students and families. A set of simple, informative print materials should be created and disseminated in school and in the community to advertise the new website and illustrate key features.

- Provide them with the following straightforward, materials designed to drive people to the new website.

    - Educator-oriented materials with an overview of key features and step-by-step descriptions of important tasks that can be accomplished through the website.

    - Student-oriented materials to hand out at the beginning of each semester.

    - Parent-oriented materials given out at parent teacher meetings and/or sent home with students.

- Provide the materials above in a kit that has enough value to hang onto and use for more than one school year.

- Consider providing brief in-service training for educators during back-to-school week.

- Provide a brief lesson plan for non-GEAR UP educators to help inform students about the website and the need to prepare for college.

- Urge educators to make the new website the default home page for all career center computer browsers.

Market to teachers of adult basic education and ESL classes at community colleges where the parents and siblings of target students are likely to be taking classes.

- Provide them with a similar package as other educators, in as many languages as possible, but certainly in English and Spanish.

- Provide them with a lesson plan about preparing their children for college and ask them to repeat it regularly.

2. Social Media Strategy

This new website and any key content features will be need to be sharable through basic "Share This" functionality. However, this is just one fundamental requirement for the website development effort. GEAR UP must look at the bigger picture and map out a sustainable social media strategy. Having one is absolutely essential to the success of this endeavor. These goals are multi-faceted and rely on one another for viability: Drive traffic, encourage participation and cultivate your identity. We recommend working with a firm or a consultant to determine the following:

- Where do you need to be? MySpace, Facebook, Twitter, Tumblr, Google+?

- Who are you reaching through these different channels? Do you have multiple Facebook pages based on audience? Do you use Twitter as an extension of the calendar system and tweet about deadlines? Is there a Paper.li site geared toward teachers?

- How or where do you encourage dialog?

- How are these efforts integrated into the website functionality?

- Exactly how do you measure success? When or how do you adapt and optimize your strategy?

3. Advertising & SEO

One very basic measurement for the success of an online product is traffic. Getting people to the website is critical and will likely present a significant hurdle in the beginning. In addition to your social media strategy, we recommend your marketing firm conduct low-cost advertising campaigns that adhere to key times in the academic and college preparatory calendar. Obvious channels include: Google, Yahoo, Bing, Facebook and MySpace. Your campaigns should coincide with key dates and deadlines in the academic year. Additionally, we recommend cultivating a link sharing strategy with other partner and affiliate websites. Finally, you will need to monitor and adapt your content publishing and advertising efforts based on analytics. With a plan to refer back to, you should be able to evaluate your own metrics and adjust your tactics on a regular basis. Your marketing firm should manage the advertising campaigns and report back on conversion rates.

C. Product Development Strategy: Online Tools & Key Features

One of the important messages we heard is that students are overwhelmed with deadlines and responsibilities and have little time to spend online pursuing distractions that will not help them reach their goals. Our assessment, based on this research and our understanding of GEAR UP's budget for this project, is that a new development effort must help solve specific problems. That said, we believe that the tools and content features we describe below should be fun, interactive, effective and inspirational. We also recommend that GEAR UP retain Drupal as its core website development framework as it supports dynamic content relationships and fine-grained administration capabilities.

Key Features:

1. Resource Portal

Through our conversations, it became clear that Washington lacks an online destination where students, families and teachers can browse a comprehensive set of college planning/application information. We recommend a clearinghouse of useful, vetted online resources made accessible through a portal-like interface. The information would include both internal content (GEAR UP) and external resources.

More than a database, this system would rely on a relational data model where information could be labeled, categorized, tagged and given relevant context. This approach would allow for a layer of browse and filter functionality where users could search based on a range of criteria. Users could also rate, share and recommend resources and that information could rise to the top of the Resource Portal interface. In the Drupal system, the context applied to this information (categories and tags) would create opportunities to associate the data with other types of content. For example: A user viewing a video on the FAFSA website would see a list of resource links related to FAFSA. This would enable users to access the information through multiple entry points.

Requirements & Considerations:

- This feature would necessitate a very comprehensive information architecture effort that would rely on an informed content mining and vetting process. It would also require that a knowledgeable staff member participate in content integration by adding, categorizing, tagging and providing descriptions for resources. Going forward, staff would need to maintain the content by continually adding new resources and editing/deleting others.

- User experience will be key to the success of this website. A design and development process that delivers a simple, yet sophisticated interface is critical.

- Potentially, GEAR UP might consider a system where educators, partners and related organizations could submit resources directly to the system. Vetting of submissions would be required, but this sort of participation would be ideal.

2. Calendar & Timeline Management System

Everyone we spoke with noted that timeline management and deadline awareness is one of the most difficult aspects of college planning, especially in the 12th grade. We recommend a robust, multi-feature calendar system where users orient themselves based on where they're at in the process and receive alerts and reminders about key deadlines, events and opportunities. Ideally, the system would allow educators to serve as administrators for their schools and/or districts. This would allow them to create calendar events and alerts based on their own program activities and curriculum. Potentially, educators could even target specific students who might need an extra push toward specific goals. At the highest level, we recommend an engaging infographic that drives home the big picture plan for college based on where students are at in the timeline.

Requirements & Considerations:

- As with the Portal data, a GEAR UP staff member would need to ensure that the calendar system is maintained with up-to-date events, deadlines and reminders. This type of system could be configured so that partners and teacher/coordinators could submit events that would be targeted toward their specific schools and GEAR UP groups.

- The online system could be augmented with personalized tools like widgets (desktop, iGoogle, mobile) or a Facebook app. However, the most inexpensive (and potentially effective) way to reach individual students is through SMS text messaging. Students could provide their cell numbers and opt to receive SMS text notifications about impending deadlines.

- There could be a gamification aspect of the functionality that offers a fun factor for students. A discovery process with the chosen vendor will determine if this is viable based on end user interest and budget constraints. As a team you will need to conceive and evaluate potential concepts and, ideally, test-drive the ideas with actual students. One particularly viable approach is to make use of other social media platforms to accomplish this goal. For example, systems like Gowalla offer inspiring examples of how you might leverage and showcase location based student activities such as community service or campus tours. (See a discussion of location based gaming for education here: http://chronicle.com/blogs/profhacker/location-based-gaming-for/26720)

While we have determined that it is unlikely that there will be a shared login option with other college readiness systems, it will be worthwhile to evaluate the viability of using OpenID to allow students to easily connect with the new website. (Read more here: http://openid.net/)

3. Educator Community Forum

The new website system should include a robust configuration of Drupal's Organic Groups module. This feature will allow GEAR UP educators to access resources (forms, reports, etc.), share information and interact with other GEAR UP educators. It will also provide a targeted, private channel for GEAR UP staff to communicate with educators.

Requirements & Considerations:

- If Organic Groups is to be successful, GEAR UP staff will need to establish an initial strategy for seeding group content and conversations.

- Drupal is an ideal system for cultivating online community. While we recognize that student peer-to-peer interactions present some concerns for GEAR UP, we also feel that this type of sharing and dialog is critical. Whether you encourage groups to interact via social media services, or you choose to cultivate dialog through the website, you must acknowledge the need and the expectation for this style of interactivity.

- Going forward, the new website could offer a Q&A forum or peer-to-peer forums where students and parents could post questions or interact.

4. Story Blog

Students and alumni also expressed enthusiasm for content features that would allow GEAR UP alumni to share experiences and advice with high school students. The ideas ranged from video testimonials to a blog-style journal from college students.

Requirements & Considerations:

- The college journal concept is one that might offer the most useful, unique and engaging experience for students. In terms of functionality, it is a fairly simple development piece. However, GEAR UP would need to devote resources up front to developing the narrative concept, defining the publishing model and then recruiting alumni to post about their experiences. Going forward, staff would need to approve or monitor posts and recruit new contributors as older students graduate.

FINDINGS

A. Summary of Sources

A number of sources contributed to our research. The findings presented in this report are derived from the information gleaned from these sources.

Two student focus groups were conducted at GEAR UP schools: one at Federal Way High School and the other at Bremerton High School. Both focus groups consisted of 12th grade GEAR UP students, all planning to attend college or technical school. Recruitment for the focus groups was done by GEAR UP teachers/coordinators. Five to ten students were in attendance for each of the groups. Additionally, information was gathered from two GEAR UP alumni via phone interviews. GEAR UP alumni echoed much of what was shared by current students.

In addition, we spoke with three GEAR UP teacher/coordinators. Conversations were held in person with teacher/coordinators before and after the student focus groups, and one additional phone interview was conducted.

Three phone interviews were conducted with parents of GEAR UP students. Two of the phone interviews were with parents whose children had graduated from GEAR UP. One parent had a child in GEAR UP who was about to graduate, as well as a younger child in another GEAR UP cohort. Parents came from one of two perspectives. One parent was completely uninformed about college, "I didn't know much about that college thing," and therefore had initial perceptions that college was not an option for his child. Upon learning a little bit more from the GEAR UP teacher/coordinator, however, this parent was convinced of the benefits of higher education. The other perspective was that they expected their child to go to college and set that expectation very early, "Of course you should go to college." The focus for these parents was how to pay for college.

We also reviewed previous research reports, which included the "Hear Us Out report" and the GEAR UP Survey on Technology & Social Media, and we reviewed current materials from Washington State GEAR UP, including the current website. Lastly, we looked at other college-preparedness websites and websites that appealed to students regarding life after high school. Several of these other websites were analyzed for their content and messaging, user experience (UX), engagement and media strategy, design and functionality. (A detailed review of our analysis is provided in the appendix.)

B. Communications: General Findings About GEAR UP

We focused on overarching activities and supportive tools that meet students' needs as they plan, prepare and apply for college, and how these needs might be met in an online tool or product.

What aspects of the GEAR UP program have had the most positive impact?

Mentorship. Each group—students, alumni, parents, and educators alike—shared that access to a GEAR UP teacher/coordinator was the most significant factor in student satisfaction and student success. Students felt that the one-on-one access was most valuable, yet all groups also acknowledge the power of group mentorship and shared, immersive experiences.

- Educators felt that individual and group mentorship was key to motivating and supporting students. Educators noted the importance of providing support and advice at critical points in the application process.

- Students echoed this sentiment; some of them indicated that their parents may have set the expectation to go to college, but "didn't give us any guidance" on how to go about the application process.

- Alumni also noted how GEAR UP was a valuable and memorable aspect of their college planning and preparatory experience. Alumni mentioned both community service projects and the ability to take college courses in high school as key educational opportunities that aided their college prep and planning success.

- One parent indicated how the GEAR UP teacher/coordinator had an influence on their entire family. Not only did all the children go through GEAR UP, but both parents went back to school for their GEDs and additional higher-education degrees because of the mentorship provided.

- Students indicated that they were much more likely to trust a website dedicated to college resources if someone they saw in person mentioned it.

Support for navigating applications and forms. Students, alumni, and parents all spoke appreciatively of the help they received filling out forms, preparing for application deadlines and finding relevant scholarship applications.

- Alumni noted that support for parents and students is critical as they navigate the scholarship process. One recalled how GEAR UP helped her mother fill out the FAFSA. She suggests that parents of recent grads could offer messages of encouragement and support to other parents.

- One parent suggests the benefit of a 3-ring binder that collects all the necessary information to apply to college—from college-application deadlines to information about campuses of interest. The binder serves as a tangible and shared book of information for the entire family.

Financial support and program resources. Students, parents and educators immediately acknowledged that money for test fees, applications, transportation, tutoring, stipends and scholarships was critical. Some educators referred to the GEAR UP money as "research money"

which afforded students experiences they may not otherwise have had to help them make a choice about college.

- Alumni were quick to point out that GEAR UP-funded community service and educational opportunities were key to their college prep and planning success.

- Students also referenced collective activities such as campus visits, field trips, community service/volunteering, college courses and/or technical training as memorable and helpful.

- Educators mentioned the importance of sponsored events that foster parent/student participation.

Positive messaging about going to college. Students who have had the GEAR UP experience believe that they can go to college.

- GEAR UP educators constantly share this message with their students: "You can go to college, and there's money for everyone!"

- Current messaging is not always consistent from print materials to the website.

- The word 'dream' is used often in print and online materials, as in the tagline *College: My Dream. My Plan.*

    - Some students may well have a dream of going to college.

    - But for others, college may be so far off their radar that 'dreaming' of it only reinforces the difficulty of getting there.

What aspects of the GEAR UP program have had little impact? What's not working?

GEAR UP workbooks. Students, alumni and parents all needed reminding before they knew what the GEAR UP workbooks were, and some did not recall anything about a workbook. [Note: the alumni and parents interviewed may have gone through GEAR UP before workbooks were widely in use.] Very few knew that GEAR UP had a website.

Inconsistent access to the GEAR UP program and funding. Student and alumni experience varied greatly based on a variety of factors, namely the program is not consistently available to students between middle school and graduation. In some cases, we heard that program funding is cut midstream.

- One alumnus reported her GEAR UP program was intermittent (she only had it in 8th grade, while her older brother had access to the full program) and her scholarship was just rescinded. Another said that transportation for community service activities would have helped students.

- Funding options seem to vary from school to school. For example, not every GEAR UP program offers transportation.

How are teacher/coordinators reaching families? What factors are critical to successful outreach?

Automated and personal connections. Educators shared tactics for connecting with families that are both impersonal and in-person, but all serve as a way to eventually bring parents into the schools and make personal connections.

- Robo calls are the most efficient way to connect with parents.

- Email is useful to stay in touch.

- Setting up a table in hall on parent/teacher conference nights to catch parents when they are in the school already.

- GEAR UP/school-sponsored events such as hosting information sessions where dinner is served and whole family is invited.

- Regardless of how connections are made, multi-language take-home materials are essential for parents.

What would help students and their parents prepare for and apply for college?

Concrete information. Even students whose families start talking early on about going to college wish they had solid information about what they need to do to prepare.

Information about paying for college. Many students think paying for college is the biggest hurdle. They need to know about available funding in all forms throughout the process of preparing for college.

Advice about which scholarships are viable. Several students noted that time and effort is wasted on scholarship opportunities that are not feasible based on a student's profile and the family's financial situation. This seems to be a critical point where families and students must be engaged together in their efforts to secure scholarships.

Help with the FAFSA. Students, alumni, parents and educators all agree that the FAFSA is extremely difficult to fill out. Tutorials, workshops, and guidance about how to fill out the FAFSA draw eager crowds. Help filling out other applications would be beneficial as well.

Early notices about deadlines. Students, alumni and parents all shared the need to be warned and reminded about key deadlines for college applications. They would find it extremely helpful if schedules and deadlines for all Washington state college applications were provided early, along with some basic how-to's for planning and applying.

- College essays need to be written. One parent suggested starting this process in September or even the summer before senior year. Even without knowing what the specific requirements of the essays will be, there are three main themes that will apply to almost all college admittance essays: a) how you view diversity, b) values that you live by, c) obstacles in life.

- Transcripts need to be gathered.

- Letters of recommendations need to be asked for and collected.

- Financial information needs to be collected.

Tips from parents for parents. Students indicated that stories or tips from parents of recent graduates to parents of high school seniors would be valuable. One student pointed out that the next generation of parents would be more likely to access information via websites and smart phones, but these mediums are not currently used in depth.

- Parents who have successfully navigated the college-application process with their child have developed tools that could benefit other students and their families. One example is a family's 3-ring binder approach detailed above.

- Educators share how important it is to connect with the families through workshops, conferences and especially sharing meals together.

What aspects of the college application process were the most difficult?

Time and stress management. Students, alumni and parents consistently expressed that reminders and early access to information would help them prepare for the 12th grade onslaught of tasks and critical deadlines. Specifically, the application processes for the numerous college institutions are confusing with many steps and variables.

- Students and alumni both shared that additional reminders, alerts and support around application deadlines would be helpful. Getting the word out earlier is critical.

- Very few parents realize how early college applications are due. Some are not aware of major deadlines until it's nearly too late. The FAFSA is often completed in a rush as a result. "*We had planned to start the application process over winter break, but UW's application was due Dec. 15.*"

- Parents who have not attended college themselves and had not thought ahead about their child attending may take less-structured approach to deadlines and timelines. For these parents and families, it's acceptable if students need to take another year to prepare and apply or take time off from college to work, then return at a later date.

Sifting through scholarship and loan options and applications. Many students noted that the myriad of scholarship opportunities is overwhelming. Students who graduated a year or two ago did not have access to WashBoard.org and expressed the need for a good browse and filter tool for finding scholarship matches.

C. Marketing/Outreach: Findings About Reaching a Broader Audience

How will students and parents find the new website?

Teachers are a trusted source. Both students and parents would be more likely to go to the new college preparation website if a teacher recommends it to them

In person connections and education. Educators suggest that the ability to provide information about the website, both to educators themselves and to parents, is critical.

- The ability to sign up parents with an account or hand them something with the URL at school events would be helpful.

In service days present an opportunity to connect with teachers and provide information about the website and how to engage in outreach.

Social networking websites. Educators suggest that a GEAR UP Facebook page could be very useful to drive students to the new website.

- Parents from all walks of life and backgrounds use Facebook to keep in touch with friends and family. However, the parents we spoke with did not use Facebook to gather information. One parent indicated that there are some Facebook parents, and they would follow and learn from a Facebook group if it was relevant to them.

- Students use social networking sites extensively. They visit often and use these sites to send messages. They use MySpace (34%) more than the general populace. Facebook is used by even more students (49%) than MySpace.

- One educator set up her own GEAR UP Facebook page and noticed that students unknown to her were "friending" it.

- Google, MySpace, Facebook and YouTube are the sites most visited by students.

Search engines. Students and families alike use search engines such as Google, Bing and Yahoo to find information. They all say finding reliable college preparation website via search engines is difficult, but that's where they often look.

Third parties. Additional opportunities outside of the school exist as possible ways to connect with families and share with them the messages about preparing their children for college. These include: church, community centers (YMCA, cultural) and daycare centers.

Community colleges where family members are taking ESL or adult education classes provide an opportunity to reach parents of low income and immigrant students. One GEAR UP teacher reports having success making presentations to adults in those classes.

D. Online/Website: Ideas for Content and Features

Overall, educators had the most feedback and suggestions for useful features in an online tool/website. Students, alumni and parents also contributed ideas and gave opinions about ideas that we offered. Reviews of other college and career preparation websites and websites targeted to younger people provided different perspectives.

The three teacher/coordinators we spoke with reacted enthusiastically to the concept of a "portal" website that would serve all students in Washington state. But they also reiterated what we learned from students: Person-to-person interaction is the most valuable way to help students and families successfully navigate the process of planning for and applying to college. That said, they readily acknowledged that a new website system would be indispensible for those who either don't have GEAR UP or who have inconsistent access to the program. Ideally, the website could serve to alleviate hurdles and also support teachers, students and families as they struggle to keep up with college planning milestones and deadlines.

Alumni were also enthusiastic about a new website system, and both expressed their willingness to contribute content and offer their stories as long as the time commitment was minimal.

Parents seemed to have a difficult time conceptualizing an online college preparedness tool, but the three parents we interviewed had already completed the college application process for their children—some of the children were several years out of college. We learned, however, that parents from all walks of life connect to family and friends via email and Facebook. Also, Google is the first place they turn to find something online.

Students shared that they didn't have much time to spend online unless it had an express purpose, even if that purpose was to unwind from the day and keep in touch with friends. They almost all had a Facebook account for random fun posts, event invitations, photos, games, and instant message. A few mentioned that homework help could sometimes be gleaned from a Facebook post, such as help with a math equation. Other frequented websites included YouTube, ESPN, StumbleUpon and CraigsList. In addition to Google, students listed collegeboard.com, washboard.org, wois.org, college websites and virtual tours as helping them with their college research.

What can we learn from other websites?

College & Career Preparedness Websites
Several websites such as College Success Foundation (http://www.collegesuccessfoundation.org/) and Oregon My Path Careers (http://mypathcareers.org/) do a great job of telling stories through content, video and photo diaries.

However, all of the websites tend to falter when it comes to the overarching user experience. In terms of usability, the organization of key content and resources tends to be confusing and/or the trail leads to a PDF file or redundant information.

The current GEAR UP website has multiple entry points for different audiences and you can find what you're looking for. However, much of the information is only accessible as PDF downloads.

With the KnowHow2GO website (www.knowhow2go.org), the multiple sets of navigation and messages are extremely disorienting, but the look and feel is clearly aimed at the student audience. In addition, they've created a virtual "KnowHow2Go University" Flash application that is difficult to use and offers very little information.

One important deficit is that none of these websites appear to have a strong social media or user engagement strategy. While some sites offer the standard "Share This" functionality, there are no compelling drivers to participate or any effort to cultivate peer-to-peer conversations. In short, the strategy, content and functionality just aren't there.

Model Websites
The U.S. Air Force (http://www.airforce.com) and Army websites (http://www.goarmy.com) have the most impressive offerings. There's something for everyone and the user experience is clean, clear and very sophisticated. The design and messaging meets the intended audiences (young people and their parents) exactly where they're at in a tone that is respectful and to the point. The notion of "Career" is a constant theme and the media components are geared toward conveying a "realistic" view of military life. Not only that, but you can "talk" with "actual" soldiers. While much of the content is fairly serious and down-to-earth, the fun factor is there too. Virtual reality games allow users to scope out vehicles and equipment and role-play in combat situations. These sites undoubtedly cost millions of dollars to develop.

Inspirational Websites
We looked at a few websites that do not necessarily reflect GEAR UP's mission and goals, but simply offer inspirational examples of message delivery and user engagement. Girl Effect (http://www.girleffect.org/question), One (http://www.one.org/us/), and It Gets Better Campaign (http://www.itgetsbetter.org/) offered some of the most compelling examples of innovative content and delivery. These organizations have achieved the ultimate goal for online outreach–the content (and the messages) have gone viral.

While we don't expect that GEAR UP will invent the next, coolest phone app or inspire video testimonials from thousands of people, we do think that its important to look beyond the education sector and seek inspiration from model websites that are geared toward young people and offer innovative examples of story telling and social validation.

Note: A more detailed assessment of each website can be referenced in Addendum A at the end of this document.

What sort of online tools or resources would be helpful?

Calendar. Everyone felt that a calendaring system with alerts for key deadlines, including the application deadlines for all Washington state colleges, would be critical resource.

- Students were enthusiastic about a calendar system with reminders and alerts sent via SMS text message and email.

- Educators state that an online calendaring system that conveys a "big-picture" timeline along with critical alerts regarding deadlines and opportunities would be useful for

students, teachers and families. For example, a guide to college applications essays might suggest: "Draft an essay on at least one of three subjects as soon as senior year begins. Expect to have a polished, edited draft ready by the end of November. Refine the essay based on the specific question asked in the college application."

- Parents generally feel that the ability to set up an account for their child and track their child's progress within a college-readiness curriculum would be beneficial.

- Additional calendar resources include suggested timelines for when to start certain activities and key dates for Washington college applications.

Relevant/Contextual Search. Students and parents both want a better way to search for and find college prep, application and financial aid info. The current search options via Google are not helpful and often suspect. Students don't trust the results.

- Sifting through online resources: Students from both Bremerton and Federal Way noted that Google is not a viable option for finding information about funding, colleges and college preparation. They astutely noted that the highest ranked search results in advertisements do not reflect their needs and interests.

- Specific university or college websites are often a source of information, such as deadlines, but students and parents find university and college websites difficult to navigate.

- Many students noted that the myriad of scholarship opportunities is overwhelming. Students who graduated a year or two ago did not have access to WashBoard.org and expressed the need for a good browse and filter tool for finding scholarship matches. Local scholarships listed by Washington state county would be very valuable, especially to help students and parents narrow down their search for relevant scholarships.

FAFSA help. All sources indicate the need for additional help on the FAFSA. Many suggest an online video tutorial for filling out the FAFSA would be beneficial.

- Students should be warned that FAFSA.com costs money to complete but FAFSA.ed.gov is free.

Connection with GEAR UP staff and/or other students. Students shared their desires to not lose the connection with GEAR UP staff and students. They suggest an ability to connect with their teacher/coordinators and peers to ask questions and get answers.

Real stories from real students (and parents). Students and parents would appreciate hearing from other students or parents that have recently completed the college application process. Students would also appreciate day-in-the-life stories and videos from college freshmen, as long as they are "real and not cheesy."

- Specifically, students would like to hear from college students about transitioning from high school to college life. Students also noted that other students who don't have GEAR UP would benefit from inspirational stories. A Bremerton student stated that testimonials should offer "Proof! Show us some examples of real kids who managed to get in and pay for college."

- Alumni suggest that a tip of the week/month would be great and could include advice and information about what its like to transition into college life and managing the first year.
- Alumni also think that a college-specific blog would be great to give students a sense of how experiences might vary from a large state school to a smaller private college.

What sort of features and user experience would make the new website useful?

Simple, clean design.

- Strong usability and information design: "smooth, clean, simple, easy".
- Several students discussed the experience of using different college websites. Some are better than others, some are not useful until you apply and most colleges follow up with an irritating amount of spam. College websites with virtual tours were lauded.

Single-user login.

- A single-user login, meaning one login and one password, for the new GEAR UP website and WashBoard.org, as well as any other key sites that are key to the process.

Comprehensive resource. The idea of a comprehensive Washington state online portal to "all things college planning and prep" was received very positively. Teachers/coordinators pointed out that students have trouble navigating online resources. Specifically, they have trouble finding what they're looking for on the CareerBridge.wa.gov website and they often seek help from teachers.

Interactive curriculum. Interactive workbooks would be useful. Teachers/Coordinators saw advantages to a system that would allow them to track student progress and monitor who needs attention or a push.

- A tracking system could also be used to aggregate progress and results, helping teachers to refine and improve their approach. This data might apply to the GEAR UP program as a whole.
- Multiple entry points based on audience/grade level are key to getting students and parents time-sensitive information.
- Few recall seeing a GEAR UP workbook, so there were no comments about whether that curriculum would be beneficial if available online.

Students expressed interest in interacting with GEAR UP online by:

- Asking and answering questions through a peer-to-peer forum.
- Emailing questions to staff.
- Chatting with other students and counselors online.
- Participating in a GEAR UP social network.
- Watching videos about preparing for college; success stories.
- Reading blogs about college life.
- Three-quarters of students would sign up to receive SMS text message reminders and updates, according to the GEAR UP Technology Survey.

Appendix A: Online Research

We reviewed approximately 20 college and career preparedness sites. Beyond the education sector, we also analyzed several websites that present examples of model content and messaging, user experience (UX), engagement strategy and high-quality media, design and functionality. We considered the following questions as we evaluated the efficacy of each:

- Does the website attempt to solve a problem or offer critical information?

- Is its easy to use? Does it work?

- Does the content speak to its target audience(s) in a tone that is appropriate for the subject matter and the demographic? Are the key messages obvious? Does it tell good stories?

- Are there features that enable participation? Can users interact and share?

- Are there clear, emotive, viable calls to action?

- Is it cool? Is it unique? Does it look good? Is there a fun factor?

- As a whole, is the UX likely to shape ideas and drive action?

Website	Key Attributes & Observations
GEAR UP Washington http://www.gearup.wa.gov/	• Access to PDF resources • Multiple Entry Points based on audience: Middle School, High School, Parent, Educator • Entry Points based on timeframe: Discover your future, Plan now, Apply for college, Pay for college (links all to PDF resources) → Positives: Multiple entry points make good sense → Negatives: PDF downloads are helpful but not immediately engaging. Users should be able to participate and 'act' within the website.
College Success Foundation http://www.collegesuccessfoundation.org/	• Success stories (student photos, stories and videos) • Facebook (1,800 fans), Twitter (2,700 followers), YouTube (13 followers, 14 videos) → Positives: Polished video stories → Negatives: This website serves as an example of most education websites. While its one of the better, it is not particularly interesting or engaging.
GEAR UP California http://www.castategearup.or	• Videos (should be tag-able depending on intended audience – students vs. educators)

g/	• Facebook (126 fans, almost 0 participation), Twitter • E-newsletter: audience primarily educators, adults? • Good looking website, but not great for the purposes of the student audience and engagement tools → Positives: Nice design → Negatives: Poor UX. Lots of info with little context. Speak to your audience and make it clear what the content offers and for whom (or at least tag resources for intended audience/s).
Oregon My Path Careers http://mypathcareers.org/	• Videos: casual, candid, relatively un-polished, short • Photo diaries: images and brief content based on day in the life of specific job • Explore careers: basics needs and fields of study, links to college websites (could use the same functionality for exploring in-state colleges) → Positives: Great example of videos (short, candid, on target); Nice photo diaries (if you don't read the text, you can look at the images); Engaging design concept and content (tone of voice is casual and to the point) → Negatives: It is not clear that the images are clickable; There's a huge amount of resources displayed in alpha order (info could have a browse and filter feature or a list view where the content expands on click)
Know How to Go www.knowhow2go.org/	• Multiple entry points based on audience and interest • Video success stories: low-budget, rather awkward interview format • Resources • Quizzes • PSA's • Virtual "KH2G Campus Tour" → Positives: There's a ton of good information, resources and fun features (informative, inspirational) → Negatives: The UX and interface design does not do a good job of presenting and organizing the information (feels cobbled together); Too many bells and whistles present barriers to quickly accessing information; Multiple/confusing navigation components; The KH2G "college" feature is buggy and presents more "fluff" than good content
Regence Insurance Advisor http://www.regence.com/individual/modals/advisor/startHere.html	• Virtual advisor: video and interactive forms guide user to an insurance plan that meets their needs. → Positives: Good example of making basic information 'interactive'

	→ Negatives: video/virtual person could be tedious for younger/fast-paced users
Go Army & Air Force http://www.goarmy.com/ http://www.airforce.com/ Forums: https://forums.goarmy.com/index.jspa Widgets: http://www.goarmy.com/downloads/widgets.html Downloads: http://www.goarmy.com/downloads.html	• Videos: very polished (HQ/feature film style production) intimate look at role/life • Forums: very active discussions and participants, 167,000 participants, "top participants" – point system based on activity, tags • Facebook (active participation, 100k fans), MySpace (90k fans but no longer active), Flickr, Twitter, YouTube (149 videos, 333k video views) • Contact: chat with recruiters online • RSS feeds: general goarmy.com and soldier stories • Widgets: Army countdown, Army target practice, etc. (good idea for homepage customization – college countdown, college goal tracker, upcoming deadlines) • Games – video game style simulations • Wallpapers and screen savers; Ringtones • Army job matcher: bubble chart to match your interests to an army career path • Life in the Air Force "timeline browser" • Air Force Careers page with filter/browse options; ability to browse by tag terms; Concise career profile page • Both websites offer Spanish language versions → Positives: Excellent content/messaging with the notion of "Career" front and center; Multiple entry points for potential recruits and parents; Very active forums (p-2-p); Great social media; Great multi-modal downloads (widgets for laptops and custom homepages, wallpapers, ringtones); High-end games; Career/job matching
Girl Effect http://girleffect.org/ Resources: http://girleffect.org/mobilize/share-it#EventGuide http://girleffect.org/mobilize/wear-it Cool roadmap graphic: http://girleffect.org/learn/the-revolution Informative PDF resources: http://girleffect.org/learn/more-resources	• Very simple, user-friendly site: calls to action are clear and easy to discern • Facebook (234k fans, active participation with fans), Twitter (10k followers), YouTube (10 videos, 2.6mil video views) • Great personal videos: Authentic place, YouTube, captions, short, emotionally compelling; Able to share videos on social networks • Downloadables: Logos, videos, presentation kit, web banner, house party kit, t-shirt art, buttons, stickers, posters, wallpapers for computer & cell phone → Positives: A model example of UX; User friendly, intuitive, graphically engaging and informative; Amazing social media and sharing (viral); Emotionally compelling and authentic videos; Great examples of useful/compelling resources/downloads (logos, videos, information kits, stickers, posters, wallpapers, graphics); Perfect approach for target audience
DO Something www.DoSomething.org	• Forums: active forums for participants about a range of topics http://www.dosomething.org/forum • Videos: Rain Wilson and participants make videos

	http://www.dosomething.org/video/rant-rave
	• Projects/teams: create a campaign/project, use website as hub for project members
	→ Positives: Good example of a lot of functionality based on participation and engagement; Another example of great forums
	→ Negatives: There's might be too much going on; The website might benefit from better overview content or a video that conveys the organization's purpose, how to get involved and/or use the website
One campaign http://one.org/us/actnow/	→ Positives: Another great video example of viral use/marketing (different than Girl Effect but just as compelling): http://www.youtube.com/watch?v=u83FnSssTEc
It Gets Better Project http://www.itgetsbetter.org/ http://www.youtube.com/user/itgetsbetterproject	→ Positives: Amazing example of viral social media and participation (peer learning/sharing); Leverages themes of likeness, positive association, being a part of something, community.

Appendix B: Sample Editorial & Content Maintenance Schedule

This schedule assumes that GEAR UP is engaging both the "Must Haves" and the "Nice to Haves" activities of content strategy, curation and maintenance.

Daily: Approximately 2 hours
- Moderation/Engagement: Monitor forums and social media activity; respond to questions (within 24 hours); approve calendar submissions and/or resources   - Content curation: Source and vet new resources to publish   - Track/report bugs
Weekly: Approximately 8 hours
- Editorial: Post news/op ed blog   - Generate/Curate new content: aggregate/add new portal resources (links, docs from external sources); aggregate content to social media outlets; add/edit calendar dates and milestones
Monthly: Approximately 8 hours
- Track and assess site traffic metrics and modify key content if needed   - Track and assess advertising metrics   - Review and assess audience engagement: Red flag interactions that may be problematic; Log successes   - Check in with Alumni bloggers   - Review/update content publishing schedule
Quarterly: Approximately 8 hours
- Draft and send enews to Educators   - Meet with tech support to discuss any issue with functionality or desired modifications   - Report on metrics, what's working/what's not   - Adjust advertising placement and content as needed   - Adjust strategy documentation

GEAR UP Website Elements Proposal

1.1 Purpose & Background

GEAR UP Washington is a federal and state funded program that helps low-income students in a limited number of school districts prepare for college by providing educators, tools and resources.

GEAR UP Washington intends to launch a new website to help middle and high school students in Washington state do all that is necessary to prepare for college. Educators, families and students alike will be invited to use the website as a resource to support the following college planning and preparation activities:

- Taking the courses in middle and high school that colleges require of applicants

- Signing up for and taking the right tests including EXPLORE, PLAN, and ACT

- Applying for financial aid and finding scholarships

- Meeting all the deadlines in the college application process

The new website will provide resources for educators, students and families who are not in the GEAR UP program as well as those who are engaged in GEAR UP activities.

1.2 Objectives & Scope of Work

GEAR UP is seeking proposals from qualified consulting firms to conceive an identity and develop a new online destination for Washington state college planning and preparation. The process will include naming, branding, content and social media strategy and a comprehensive, multi-feature website development effort. The website will be built in Drupal and the chosen consultant must be able to demonstrate previous experience delivering rich and engaging user experiences within this CMS framework. This RFP includes a set of feature concepts to be explored and defined through a collaborative research and discovery process. GEAR UP anticipates that the chosen consultant will provide an initial budget range for the development deliverables and then refine that range to explicit numbers once that process is complete.

This new online entity should offer the best of what GEAR UP provides on the ground (support, inspiration, information and guidance), plus new features that address stated problems from key audiences: educators, students and families. Specifically, the following goals will guide both the concept and product development efforts:

- Serve all students/families/teachers in Washington state, including those who don't have access to the full GEAR UP program

- Provide solutions to stated problems: i.e., a better way to browse and access online resources, timeline management for students and parents

- Offer "real" stories and advice from GEAR UP alumni

- Better position GEAR UP handbook content so that it is searchable and accessible to key audiences, especially those students and educators who are not part of GEAR UP

- Enable participation and social validation through sharing and peer-to-peer interactions

- Launch with a flexible information architecture, design and feature set that can scale over time

- Create an experience that feels vibrant, authentic and provides clear, compelling pathways for different audiences to access key information

3.2 Technical Proposal

A. Project Approach & Methodology
The consultant must convey their understanding of this issue area and audiences, and define a holistic approach to delivering the full project scope.

B. Work Plan
The work plan must address all project requirements with proposed tasks, deliverables and key questions. A detailed discussion of the proprietary and/or industry standard methodologies to be employed should also accompany the tasks and deliverables.

C. Project Schedule
A broad schedule should outline project phases with date ranges and estimated hours for tasks and/or deliverables. Following an initial discovery and requirements gathering phase, the chosen consultant must refine the project schedule to include greater specificity and detail.

D. Risks
The consultant must identify potential risks that are considered significant to the success of the project.

E. Deliverables & Project Requirements

1. Identity & Branding – The consultant will lead a comprehensive strategic and creative discovery process that culminates in a name, identity system and message framework for the new website. This work will inform the look and feel of the website as well as any print materials needed for the post-launch, marketing phase. Work should specifically include:

   - Vetting name options for trademark conflicts and proposing viable web domains
   - Creating an identity system with elements that easily translate to user interface design and print materials
   - Developing a message framework that reflects multiple key audiences

2. Content & Social Media Strategy – The initial discovery process will inform a content and social media strategy that addresses the following project goals:
   - Conceive and define content features that showcase key information (messages, resources, story blog, calendar events, user interactions, etc.) and determine how these features translate into core functionality
   - Create an engaging approach for targeting content to specific audiences
   - Generate high-level page content based on the message framework and provide GEAR UP with direction for generating additional page copy
   - Determine a plan for seeding blog, resource, calendar and group forum content
   - Determine how social media services can be leveraged to drive traffic, encourage participation and elevate the website's profile
   - Provide guidelines for ongoing content curation and social media engagement

3. Design & User Experience – In addition to creating a look and feel for the website, the consultant will define an approach to user experience that encompasses standard practices as they relate to taxonomy driven features. (These features include a resource portal, calendar and timeline management system, educator forum and story blog, and are discussed in detail below.)

   The website should provide multiple entry points to content based on audience type and overarching topics and themes.

4. Development – The consultant will lead a requirements gathering process that yields functional specifications for the development deliverables outlined below. In order to define a feature set that is driven by a viable content strategy and user interest, technical research and planning should operate in tandem with the deliverables described above. Additionally, a decision on how to leverage the existing website configuration and data set will need to be made. GEAR UP assumes that the consultant will also provide a comprehensive overview of the core Drupal features and functionality.

   a. Resource Portal
   Washington state lacks an online destination where students, families and teachers can browse a comprehensive set of college planning and application information. This new destination will serve as a clearinghouse for useful, vetted online resources made accessible through a portal-like interface.

   While the current GEAR UP website offers page content and PDFs, the new website should allow for multiple resource types including embedded video and links to external content. More than a database, this system will rely on taxonomy to create targeted views of information based on audience type, resource type and topics of interest. A sophisticated browse and filter feature should be accessible at the highest level so that any user can search based on a range of criteria. Users should be able to rate, share and recommend resources and that information should rise to the top of the resource portal interface. The context applied to this information (categories, tags and node relationships) will create opportunities to associate data with other types of relevant content. For example: A user viewing a video on the FAFSA would see a list of related resources and blog links.

   Eventually, GEAR UP may want to allow website members (educators and affiliates) to submit resources directly to the system.

   b. Calendar & Timeline Management System
   GEAR UP envisions a robust, multi-feature calendar system that leverages role-based user permissions to allow for fine-grained content publishing tasks. End users must be able to orient themselves based on where they're at in the college planning process and receive alerts and reminders about key deadlines, events and opportunities. This system should allow educators to serve as calendar administrators for their schools and/or districts, giving them the ability to create calendar events and alerts based on their own program activities and curriculum. Potentially, educators could even target specific students who might need an extra push toward specific goals. At the highest level, an engaging infographic or interactive timeline should drive home a big picture plan for college based on where students are in the planning process.

This system could be augmented with personalized tools like widgets (desktop, iGoogle) or a Facebook app. However, the most inexpensive (and potentially effective) way to reach individual students is through SMS text messaging. Students could provide their cell numbers and opt to receive SMS text notifications about impending deadlines.

While the core calendar functionality is critical, GEAR UP would also like to explore a gamification aspect of the functionality that offers a fun factor for students. A discovery phase will determine if this is viable based on user interest and budget constraints. GEAR UP will rely on the consultant to drive a process that explores and evaluates potential concepts and, ideally, test-drives the ideas with actual students. One particularly viable approach is to make use of other social media platforms to accomplish this goal. For example, systems like Gowalla offer inspiring examples of how to leverage and showcase location-based student activities such as community service or campus tours.

While we have determined that it is unlikely that there will be a shared login option with other college readiness systems, it will be worthwhile to evaluate the feasibility of allowing students to login to the website using their social media accounts (e.g. Facebook Connect or OpenID)

c. Educator Community Forum
The new website system should include a robust configuration of Drupal's Organic Groups module. This feature will allow GEAR UP educators to access resources (forms, reports, etc), share information and interact with other GEAR UP educators. It will also provide a targeted, private channel for GEAR UP staff to communicate with educators.

Going forward, the new website could offer a Q&A forum or peer-to-peer forums where students and parents could post questions or interact.

d. Story Blog
A college journal concept might offer the most unique and engaging experience for students. We envision an enhanced blog feature that allows administrators to set up blogger profiles and then grant permissions to those bloggers to post content and related media (photos and video). A discovery phase around content strategy should yield a compelling narrative concept and help define an ongoing publishing model. GEAR UP is currently positioned to recruit and retain alumni college students who will serve as content contributors.

5. Quality Assurance, Deployment & Training – The consultant will engage in a standard quality assurance process that includes a beta phase during which GEAR UP can use the website and provide feedback on the consultant's implementation of key features and functionality. GEAR UP expects that the chosen consultant will utilize bug-tracking software to facilitate testing and tracking of errors. A specific plan/schedule for website deployment should be in place following the initial requirements gathering phase. Once the website has been successfully launched, the consultant will provide both technical and system administration documentation in conjunction with an in person training session.

6. Ongoing Support – GEAR UP will need to retain the consultant for some period of time to provide support and maintenance services. The consultant will provide cost options for ongoing support scenarios.